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REPORT No. 5
1988

INDUSTRIAL AREAS

PREPARED BY: POLICY DEVELOPMENT DIVISION
METROPOLITAN TORONTO PLANNING DEPARTMENT

METROPOLITAN PLAN REVIEW

The Municipality of Metropolitan Toronto

RESOURCE CENTRE

Metropolitan Plan Review

Report No. 5

INDUSTRIAL AREAS

A background document in the review of
"The Official Plan For The Urban Structure: Metropolitan Toronto"

Prepared by the Policy Development Division of the
Metropolitan Planning Department

1988

PREFACE

The Official Plan for the Municipality of Metropolitan Toronto, entitled "Official Plan For The Urban Structure: Metropolitan Toronto", was adopted and largely approved in 1980. The Plan applies to the Metropolitan Planning Area comprised of the Cities of Toronto, Etobicoke, York, North York and Scarborough and the Borough of East York. This area is illustrated on Figure 1.

In March 1986, the Metropolitan Council approved a program to review the Plan. That program has been published as "Report No. 1: Program", (April 1986, Metropolitan Toronto Planning Department) and copies are available from the Department.

The Metropolitan Plan Review will proceed by studying five major subject areas, namely:

- regional assumptions and the concept;
- housing and residential development;
- employment areas and activities;
- transportation; and,
- open space and environment.

Phase 1 of the review process, of which this study is a component, is the preparation and publication of a series of technical background and proposal papers covering the above five subject areas. Community response to those papers is an integral part of the Metropolitan Plan Review and is encouraged from all sectors and levels of the community. All responses will be considered in any subsequent policy reports recommending revision to existing policy.

Industrial Areas is a technical background and proposals report which is the second in a series examining "employment areas and economic activities" in the Metropolitan Toronto Planning Area.

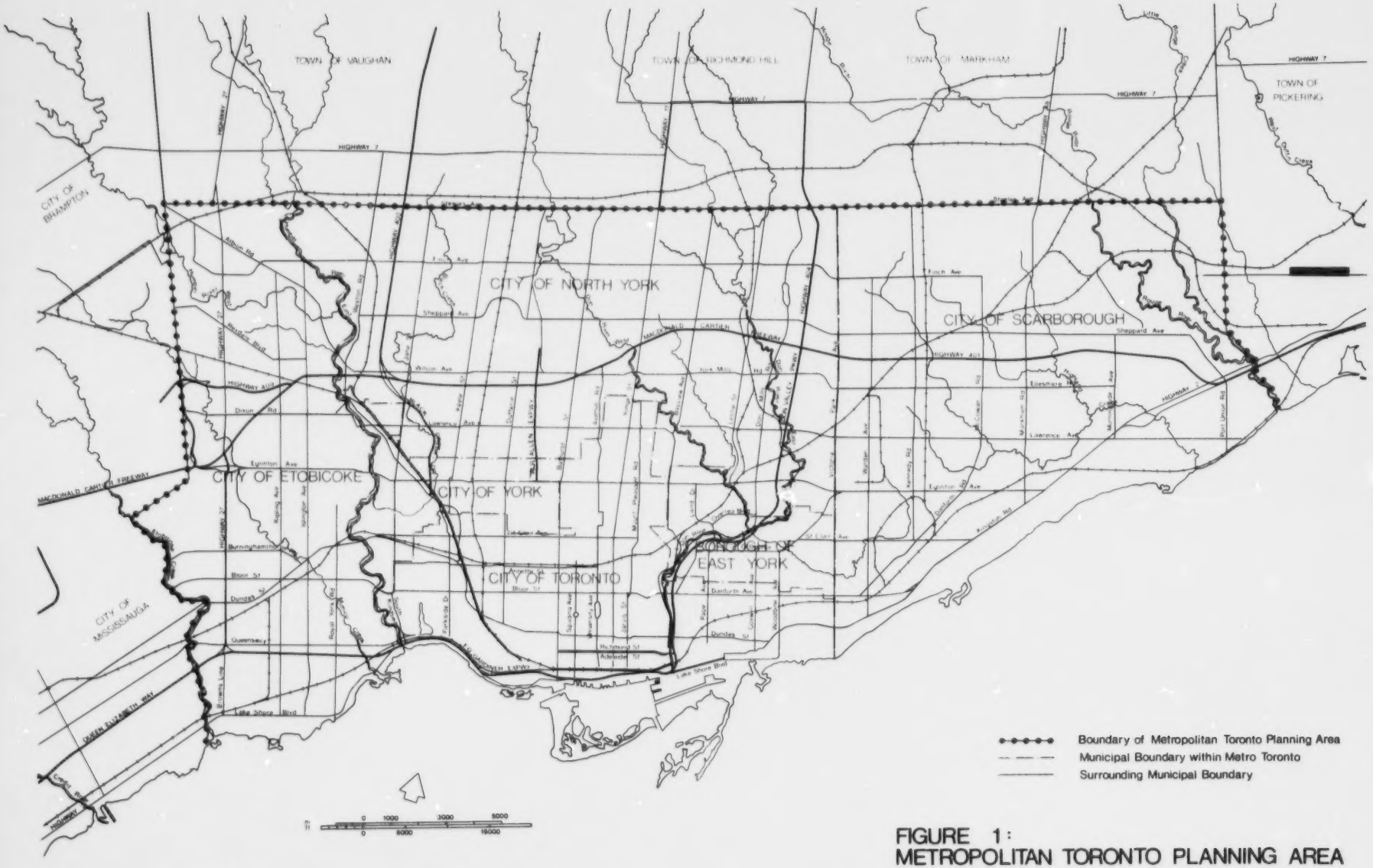

FIGURE 1:
METROPOLITAN TORONTO PLANNING AREA

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INDUSTRIAL AREAS

EXECUTIVE SUMMARY

1.0 INTRODUCTION

Industrial areas are a major element of the urban structure of Metropolitan Toronto comprising over 9,000 hectares of land. They are also significant economic areas accounting for 414,700 full-time jobs, about 40% of the jobs in Metro in 1985. Although originally designated in local plans for traditional industrial uses such as manufacturing, processing and warehousing activities, industrial areas have evolved over time as a location for a wide range of economic activities.

The Metropolitan Official Plan aims to maintain and protect industrial land for industry and increase industrial jobs so as to provide a variety of employment opportunities for Metro Toronto residents. The Official Plan has an implied definition of industry as being manufacturing, warehousing and processing activities. The Plan acknowledges that some non-industrial uses such as office and retail uses may locate on industrial land but indicates that their development should be limited in density and controlled in location. Offices are encouraged to locate in Centres. The Plan also recognizes that some industrial land may be redesignated for non-industrial use and provides a number of criteria to be used in the evaluation of redesignation proposals.

This report is directed at examining whether the existing policies in the Plan concerning industrial areas are adequate and whether there is a need to clarify or revise them. In analyzing the character of industrial areas in Metro and the trends occurring on industrial land, a number of issues arise which will be examined.

- What do we mean by "industry"?
- What should industrial land be used for?
- How should the mixing of uses in industrial areas be accommodated?
- Should we accept or try to reverse the trends affecting Metro's industrial areas?

A basic Metropolitan planning objective is ensuring that Metropolitan Toronto has an effective economic base to accommodate future economic growth. This

involves the provision of a variety of economic activities both to support and revitalize the current employment base and provide for new employment opportunities. The Metropolitan Official Plan sets out an urban economic structure to accommodate future employment growth. Industrial areas are one of the types of employment areas.

Manufacturing is the single most important economic sector in industrial areas providing employment and economic growth to Metro. The manufacturing sector also provides direct spin-offs to other sectors of the economy and is an important user of services and a significant tax base. A strong industrial sector should continue to be supported as being in the direct interest of Metro Toronto. It is in the Metropolitan interest to maintain industrial land for industry. In the development of industrial areas, priority should be given to the industrial use so as to ensure that Metro has sufficient land to accommodate future industrial growth. Development of other uses in industrial areas should be structured to ensure functional, environmental and economic compatibility with industry.

Support for industry is part of a Metropolitan interest in providing a range of employment opportunities to support and strengthen overall economic growth. A diversity of employment activities provides Metro with relative stability during economic downturns. It is also tied to a social goal of maintaining industrial land for industry so as to provide a variety of jobs for Metro residents.

To support these economic and land use objectives it is also a Metropolitan interest to ensure that Metro has an efficient transportation system designed to accommodate the movements of people, goods and services.

The policies for industry and industrial areas in the Official Plan correspond with the Metropolitan interests discussed above. This report indicates that while the policies are generally appropriate, consideration should be given to broadening their scope to address the broader range of new industrial uses, deal with the heavy service orientation of Metropolitan Toronto's economy and provide more explicit direction in the structuring of development. While the Official Plan establishes a Metropolitan preference for a hierarchy of location for new office development, that hierarchy now requires more explicit expression in the framing of policies which permit office uses within industrial areas.

2.0 CHARACTER OF INDUSTRIAL AREAS

A review of the character of industrial areas indicates the following:

- Manufacturing (involving assembly, production and processing activities) and warehousing are the most important sectors of industrial areas. The economy of industrial areas is dominated by industrial land use and floor space but with a mix of employment. Industry accounts for 56% of employment in these areas, office 28% and retail 13%.

- Computer based technological innovations coupled with economic factors are changing the shape of industry leading to the creation of new advanced industrial activities such as data processing, research and development and computer based uses. Area municipalities are broadening the definition of industry to include these new types of industrial activities. A recent plan for the Massey Ferguson industrial lands, for example, permits hi-technology, service and computer related uses on these lands.

- Area municipalities are amending their policies to permit a greater range of economic activities to locate in industrial areas. Some of these uses such as restaurants, banks, business services and day care facilities provide a service to industries in the area as well as to employees. Others respond to changing merchandising methods and the expansion of personal and business services.

- Some uses such as superstores, retail-warehouses and banquet halls have located in industrial areas because they are not able to compete or be accommodated in existing commercial areas. Industrial areas offer these uses large sites, ample parking, cheaper land costs and good visibility and transportation accessibility. The influx of these commercial uses in industrial areas is expected to continue.

- There is a significant amount of office space in industrial areas. This will continue to take place reflecting the growth of information intensive and service sector activities. But industrial areas have for the most part not attracted major office development with most office buildings being of a fairly small scale. The scale of office development in industrial areas has

not been found to conflict with Metropolitan priorities for office development to be located in Centres.

- Industrial areas in Metro are not homogeneous. In some areas such as Southern Etobicoke, Weston Road/Junction, Dufferin/Keele South and West-Central Scarborough, industrial employment predominates and most of the land is used for industry. Most other areas are also dominated by industrial land use and floor space but they contain a mix of employment with a high proportion of non-industrial jobs. The Don Valley/Highway 404 Corridor and industrial lands in the Central Area of Toronto have quite a mix of activities with a significant office sector accounting for about 40% of their employment and 30% of their floor space.

- Industrial lands adjacent to some Office Parks have taken on an office character and are no longer industrial in nature. Continued growth of some of the Office Parks will likely continue to spill over into these adjacent industrial lands. This issue will be looked at further in a report on Office Parks.

- There is a pattern to the distribution of uses in Metro. Most of the industrial employment in Metro is located in older industrial areas dominated by traditional industry. Most of the mixed industrial-commercial activities are generally located in the newer industrial areas north of Highway 401. A significant proportion of office activities are concentrated in industrial lands in the Central Area of Toronto and adjacent to Office Parks.

3.0 TRENDS IN INDUSTRIAL AREAS

- A review of lands redesignated to or from industrial use during the period 1976-1985 indicates that redesignations have actually increased the total inventory of industrial designated land by 62 hectares. However, most of the gains in industrial land were made on the periphery of Metro's urban area. Now that few undeveloped lands remain in Metro the amount of

industrial land is likely to decline in the future as obsolete industrial lands are put to other uses.

- Proposals to change industrial uses to non-industrial uses have generally provided more employment on the site than may have been anticipated from the existing traditional industrial use.

- The concern of maintaining sufficient land to accommodate future industrial growth remains. Although Metro Toronto has 1249 hectares of vacant industrial land much of this is in small sites and cannot accommodate the needs of large industries. Most industrial areas in Metro have little vacant land. The Tapscott-Marshalling Yard industrial area with 598 hectares of vacant industrial land and to a lesser extent three other areas (Scarborough/401 Corridor, Rexdale and North-West Etobicoke), are the only remaining areas with large inventories of vacant industrial land in Metro. These areas will account for most of Metro's major opportunities for new industrial land absorption in the future.

- Industrial areas are undergoing significant changes in employment. Traditional industrial employment is declining especially in some of the older traditional industrial areas of Metro. Employment in the service sector is growing. During the period 1981-1985 industrial (mainly manufacturing) and industrial related office employment declined by nearly 15,000 jobs, while employment in retail and office activities increased by over 13,000 jobs. Several traditional industrial areas have experienced significant growth in office employment.

- Declining manufacturing employment does not necessarily mean a declining industrial sector. This is partly the result of automation and frequently reflects a more competitive industrial sector.

- Small firms have been a source of new industrial jobs while large firms with 500 employees or more have experienced a significant decline in employment. But small firms with less than 10 employees account for only 11% of the employment in industrial areas while firms with 100 employees or more represent half of the employment.

- Generally, the older industrial areas have a high employment density indicating a more labour intensive use of land. But some of the newer industrial areas such as North-West Etobicoke and Tapscott/Marshalling Yard have a much lower employment density. Due to the adoption of new manufacturing technologies resulting in a reduction in jobs and an increase in space requirements, the trend appears to be for the traditional industrial employment density to decline indicating that in the future, more land will be required to accommodate a given amount of industrial employment. The implication is that in order to maintain our existing industrial employment base, there is a need to maintain industrial land for industry.

- In the future industrial areas will increasingly develop a mixture of activities. The economy of these areas will be characterized by a changing industrial sector. While manufacturing should remain a major economic sector it will provide little employment growth. New growth will probably centre on the establishment of a large number of new small firms. But it is also important that large industrial firms be maintained in Metro.

- A continuation of present economic trends indicates that the major growth sectors of industrial areas are likely to be new industrial uses such as research and development, data processing and communications uses, service sector uses as well as specialized production and high quality manufacturing. In the central areas of Metro, new industrial activities that are labour intensive are likely to become the dominant form of industry.

- An increasing proportion of new floor space will likely be in the form of industrial-commercial malls.

- Some industrial areas in Metro comprised of older industrial premises may become obsolete for existing traditional industry and undergo a decline. They may lack the flexibility needed to accommodate new manufacturing

technologies requiring large single-storey buildings. If possible, these areas should be encouraged to attract new industrial uses and broaden their economic base for other economic activities. Otherwise, redevelopment of some of these lands may include a range of employment activities and/or housing.

- The Port industrial lands are a unique and special part of Metro providing a location for shipping and other port related activities. The Port has linkages with other industrial sectors in Metropolitan Toronto and contributes to the economic health of the region. But the area is undergoing a transition due to the decline in port activities resulting in extensive underutilized lands. The potential exists to introduce new industrial uses and other activities in the area while ensuring that the needs of port activities are accommodated. Studies should be initiated to identify Metropolitan interests and priorities for this area.

- The trend appears to be for traditional industry to consolidate in fewer locations in Metro. As older industrial areas continue to lose manufacturing and warehousing industries, Metro will need to replace the loss of these jobs with industrial employment in those industrial areas with large inventories of vacant land such as Tapscott, the Scarborough-401 Corridor, Rexdale and North-West Etobicoke.

4.0 METRO IN THE CONTEXT OF THE TORONTO REGION

- Industrial development in the Toronto Region is progressing outward with continued growth in the Regions of Peel, York, Durham and Halton. The regions surrounding Metro Toronto possess over 24,000 hectares of designated industrial land, nearly 60% of which is vacant. These regions are experiencing strong growth in industrial and commercial development.

- Metro Toronto accounts for only 8% of the Toronto Region's vacant industrial land inventory. Metro's share of the Region's industrial land absorption declined to only 12% during the period 1981-1985. Although

vacant industrial land absorption in Metro will likely not equal the rate of absorption experienced in the 1970's, it appears that the absorption level in Scarborough may be returning to pre-recessionary levels.

- The nature of industrial development in Metro will likely differ from that in the surrounding regions. As the supply of vacant industrial land in Metro diminishes, continued growth in most industrial areas will increasingly take the form of intensification of development through infill, expansion and redevelopment. Growth in the surrounding regions however will continue to centre on the development of vacant industrial lands.

- As industries automate their operations and become more capital intensive, they are likely to seek a location in the periphery of Metro and beyond in the surrounding regions.

- Many factors affecting the location decision of industrial development are similar throughout much of the Toronto Region. For example Metro Toronto has many industrial lands which are competitively priced to lands in the adjacent regions. In some factors there is to some extent a Regional comparative advantage over Metro. The availability of large tracts of vacant land in the surrounding regions provides a choice for industries requiring large sites. In addition, the combined industrial realty and business tax in Metro is about double that in the surrounding regions. However, it appears that the industrial lands in Tapscott are well positioned in the Region to accommodate greater industrial growth.

- Industries requiring low skilled workers will likely remain in Metro due to the large supply of social housing and moderately priced private rental units available here. However, at the other end of the spectrum, the very high cost of housing in Metro will lead an increasing number of firms to consider moving from Metro to locate in more affordable areas in the Region.

These trends provide the background for the following review of Metropolitan policies.

5.0 CONCEPT

Section 3.E of the Official Plan outlines a concept for industrial areas. The policy indicates a goal of increasing industrial jobs and maintaining industrial land for industry. While the policy aims to limit the development of non-industrial uses in industrial areas, a more explicit expression structuring the location of these uses would assist in the development and redevelopment of industrial lands. This report indicates that industrial areas are not homogeneous and contain a significant level of non-industrial activities.

While industrial areas should be maintained primarily for industry, we recognize that non-industrial uses will continue to seek to locate in industrial areas. Their development should be based on minimizing the conflict with existing industry and maximizing opportunities for the use of public transit.

This report indicates that Metropolitan Toronto has a limited supply of vacant industrial land. The Tapscott industrial area and to a lesser degree the Scarborough/401 Corridor, Rexdale and North-West Etobicoke are the remaining areas in Metro with a significant amount of vacant industrial land. It is in the Metropolitan interest to maintain these industrial lands to accommodate future industrial growth.

It is recommended that:

1. **The existing policy of attempting to increase industrial jobs and maintaining industrial land for industry should be reconfirmed. The policy should be clarified to provide for the redevelopment of obsolete traditional industrial lands. Vacant industrial lands that are viable and suitable for industry should be maintained as industrial areas.**

2. **The Official Plan should be amended to structure development of industrial areas so as to provide for a greater intensity of employment activities along arterial roads than in other areas while maintaining the integrity of the arterial road network.**

3. **Limited development of office, retail and service-commercial uses in industrial areas should be in a context in which development of these uses has a higher priority in Centres, Office Parks and commercially designated areas.**

6.0 INDUSTRIAL DEFINITION

Although the Official Plan has left the definition of industry to local official plans it has an implied definition of industry as being manufacturing, warehousing and processing activities. While this interpretation continues to reflect a good deal of existing industry, it can be interpreted as an administrative impediment to the current directions of new industrial activities which reflect technological advances and the evolving character of the Metropolitan economy. In order for Metropolitan policy to keep abreast with this situation, it is recommended that:

4. **The Official Plan should include a definition of industry to include such uses as manufacturing, assembly and processing; servicing and repair; storage and warehousing; transportation and utilities; research and development; communications and broadcasting; data processing, computer production, software development and related uses.**

7.0 STRUCTURING DEVELOPMENT

Although industry is the dominant sector in most industrial areas, this report indicates that a variety of other uses including offices, retail, institutional and other commercial uses as well as community facilities are also located in industrial areas. Office uses in industrial areas are seen as serving an important role providing business services for manufacturing industries. It is also felt through proper siting the small scale nature of offices does not need to threaten the stability of the surrounding industrial area. Given that the overall trend is for the office sector to increase in employment, it is reasonable to assume that there will be a continued demand for office space in industrial areas.

A range of retail and service-commercial uses have also developed in industrial areas. Some are providing a service to industry and employees and many are serving the needs of the surrounding community. An increasing number of companies appear to be utilizing part of their facilities for retailing products that are manufactured, assembled or warehoused on site. Some commercial uses such as retail-warehouses may not be easily accommodated in designated commercial areas and may be more appropriate in an industrial location.

As industrial areas attract an increasing mix of uses, a development structure is required in order to protect land for industry from competing uses while also accommodating the broader range of economic activities. Sub-section 5.D.2.b and c of the Official Plan provides for the structuring of commercial and office uses in industrial areas. While a structure is suggested, a more explicit direction for development is required if the Metropolitan interests are to be properly expressed.

It is in the Metropolitan interest to relate higher density development and higher concentrations of employment including consumer oriented activities to Metropolitan infrastructure systems of roads, transit, piped and emergency services. Such development should be compatible with the continued operation of existing industry and relate to the adequacy of the transportation system. This report concludes that in structuring development in industrial areas, a greater range of uses and more intense development may be appropriate along arterial roads than in other parts of industrial areas. In achieving this structure, access to development on an arterial road should be provided from the local road system so as to minimize the number of access points along arterial roads.

It is recommended that:

5. **The Official Plan contain statements to provide for the structuring of development in industrial areas on the following basis:**

   i) **Lands abutting an arterial road (including local arterial roads specified by the area municipality) may be used for industrial uses and a range of non-industrial uses which do not threaten the continued operation of existing industry. These uses may include office, retailing including retail-warehousing, service-commercial uses, institutions and community facilities.**

      - **Area Municipal Official Plans should identify locations where non-industrial uses may be permitted.**
      - **The scale and density of development should support the Metropolitan priority for development in Centres, near rapid transit stations, and in Office Parks.**

- **Development should be consistent with the distribution and capacity of the water supply and sewerage systems.**
- **Development should also meet the following transportation objectives:**

  a) **relate to the capacity of the transportation system; and**

  b) **minimize the number of access points along arterial roads by providing access to development on an arterial road from the local road system where possible.**

ii) **Lands not abutting arterial roads should be maintained primarily for industrial uses.**

- **Area municipalities may also permit compatible low scale, grade related office and service-commercial uses, institutional uses and community facilities on these lands.**
- **These uses should be functionally, environmentally and economically compatible with the continuing operation of industry in an area.**
- **Density of development should relate to the adequacy of the road system, availability of public transit, and the distribution and capacity of sewerage and water services.**

8.0 REVITALIZATION

Due to the evolving character of the Metropolitan economy some industrial areas are undergoing a decline and may no longer be functionally viable for continued existing industrial use. It is in the Metropolitan interest to revitalize these areas with priority given to new industrial uses so as to support the industrial base of the areas. Area municipalities are encouraged to broaden their economic base and increase employment opportunities by attracting other economic activities to lands that are no longer functional for traditional industrial uses. In some cases to support other objectives of the Metropolitan Official Plan, other uses such as housing may be considered. An urban design component addressing such matters as streetscape, environmental issues and heritage should

be included as part of any revitalization policies. The Metropolitan Plan should encourage the revitalization of declining industrial areas in order to promote their continued growth and development so as to achieve Metropolitan economic and social objectives. This could be achieved through financial and technical assistance to special studies and improvement to Metropolitan infrastructure and services.

It is recommended that:

6. **The Official Plan should be revised to include a statement encouraging area municipalities to identify specific industrial areas undergoing or likely to experience a significant decline in the economic health of existing traditional industrial activities. Where such areas have been identified Metropolitan Toronto should encourage and support the development of policies to revitalize such areas with an aim of seeking economic activities that would support the economic base of the area giving priority to new industrial uses. Where that is not possible, then other uses may be considered which support other objectives of the Official Plan and which are in the context of an overall plan for the area. A revitalization plan should also include policies addressing urban design matters.**

9.0 REDESIGNATION OF INDUSTRIAL LAND

The current Metropolitan Plan makes provision for the redesignation of industrial land to non-industrial use and requires consideration of several criteria in the evaluation of redesignation proposals.

The criteria address three major issues:

(1) The Plan places importance in maintaining industrial lands to accommodate 45,000 additional jobs in all industrial areas for the period 1976-2001. There is some difficulty in accurately assessing the implications of individual redesignations to the larger employment goal. The majority of redesignations involve small sites which individually have little impact on achieving the long term employment target. Most redesignations have been for other economic activities which tended to result in more jobs on the site

than any assumed industrial use. Consequently the relevance of the employment projection as a criterion for a site specific redesignation proposal relates to larger areas proposed to be redesignated to non-employment uses. In this context, we will re-evaluate the 45,000 additional job figure projected for the 1976-2001 period.

(2) Redesignations may have potential land use implications on the continued viability of the surrounding industrial area and adjacent industrial uses. The issue has been that a new use may become a potential objector to existing industrial uses. This concern remains and should be considered in any revision to the current policy.

(3) Various transportation facilities are seen by the Official Plan as playing a major role in supporting industrial uses. These include rail lines, expressways, airports, the harbour and port and rapid transit facilities. This report notes that increasingly, accessibility to and movement along certain transportation facilities such as arterial roads and expressways are critical to many industries. Consequently it is important to maintain industrial lands with good transportation accessibility.

Relatively few industrial areas have good accessibility to rapid transit facilities. Proposals to redesignate land along rapid transit facilities for more intensified development really has to do with office, retail and institutional uses. Section 5.E. of the Plan pertaining to other areas, specifically encourages such development. This also relates to an objective of the Plan to structure development to maximize utilization of the service and transportation infrastructure. Consideration should be given to including a criterion which relates the redesignation to lands within a specified distance from a rapid transit station.

In summary, modifications to the criteria would assist in the examination of redesignations with a greater relationship to current industrial development needs, other employment activities and strategic elements of the Plan. This report presents a clear concept for the development of industrial areas:

maintain industrial land for industry and structure development to permit a greater range and intensity of uses along arterial roads. It is felt that the recommendations contained in this report adequately address most redesignation proposals by indicating the types of uses to be permitted in industrial areas, outlining a structure of location and density and encouraging the revitalization of some industrial areas. Amendments to area municipal Official Plans to redesignate industrial land should be consistent with the recommendations of this report. In addition, it is suggested that redesignation proposals may also relate to other objectives of the Official Plan relating to Centres and lands adjacent to rapid transit stations. It is recommended that:

7. The Official Plan redesignation policy should be revised to indicate that amendments to area municipal Official Plans to redesignate industrial land should be consistent with the recommendations of this report or relate to other objectives of the Metropolitan Official Plan such as the policies for Centres and lands within approximately 300 metres of a rapid transit station.

10.0 PORT AREA

The Port Area has historically been dominated by shipping and various heavy industrial activities including oil storage tanks, public utilities and outside storage yards. The district has a significant amount of underutilized land. It is undergoing a transition due to the decline in port activities and its future is uncertain. Due to the uniqueness of the Port serving shipping needs of the region, the Port's potential for further employment generation, the implications for infrastructure (particularly roads and transit), and water related activities, Metropolitan Toronto has an interest in the future of this area. Various agencies and levels of government are undertaking studies of this area. If these plans are to gain acceptance, all levels of government have to work co-operatively and a process has to be developed to prepare a plan that reflects the interests of all jurisdictions. It is recommended that:

8. **The Metropolitan Toronto Planning Department should undertake a study to define the Metropolitan interests in the Port area in co-operation with other levels of government.**

11.0 CONCLUSION

Metro Toronto's industrial areas are undergoing significant changes reflecting global economic forces and the adoption of new technologies. Industrial areas are well positioned to adapt to changes in the economy and support Metropolitan economic development initiatives. They appear to possess the flexibility needed to attract new industrial development and replace declining, non-competitive uses with new economic and employment generating activities. While the policies for industrial areas contained in the Official Plan have been found by this review to be generally appropriate, expansion of the policies to deal with the broader range of new industrial uses and other economic activities and to provide for structuring of development and review of redesignations are proposed. This study recommends maintaining industrial land for industry and the adoption of policies which recognize the differences and individual needs of Metro's industrial areas. This would ensure a continued vital role for industry in Metropolitan Toronto while also broadening the economic base of some areas which are undergoing a transition. It is believed that from this Official Plan Review, policies can be established which provide direction for the future development of industrial areas.

1.0 INTRODUCTION

Metropolitan Toronto's industrial areas are for the most part functioning well. New jobs are continually being added strengthening the employment base of these areas. Global economic forces resulting in shifts in the Metropolitan economy are also leading to significant changes in industrial areas. Some areas which are no longer viable for traditional industry are expanding their economic base to include new kinds of industrial and other economic activities. Our industrial areas appear to possess the flexibility needed to replace declining non-competitive uses with new economic and employment activities. While industrial areas should remain healthy and competitive there is a need to ensure that the pattern of development be supported by Metropolitan facilities and services. Furthermore, the public transit system will remain an important element in getting metropolitan employees to these employment areas.

Industrial areas are well positioned to adapt to changes facing them. But we should recognize that as industrial areas in Metro Toronto are not homogeneous they may require policies tailored to their individual needs so as to better guide their future development.

1.1 Purpose of the Study

A major element of the urban and economic structure of Metropolitan Toronto is its industrial areas. Industrial areas comprise over 9 000 hectares of land and are distributed throughout the Metropolitan planning area. Their importance is illustrated by the fact that nearly 4 of every 10 jobs in Metro Toronto are located in industrial areas. Of the range of uses permitted in industrial areas (e.g. traditional industry, offices, retailing and hotels) industry is dominant. Industry has an important function within the economy of Metropolitan Toronto as:

- a source of employment;
- a generator of wealth;
- a provider of goods and services; and
- an element supporting other economic activities in Metro Toronto.

Although originally designated for traditional manufacturing, assembly and warehousing uses, industrial areas have evolved over time into more broadly based employment areas, providing a location for a wide range of economic activities. This raises a number of issues:

- What do we mean by "industry"?
- What should industrial land be used for?
- How should the mixing of uses in industrial areas be accommodated?
- Should we accept or reverse the trends affecting Metro's industrial areas?
- How should development of industrial land relate to other objectives of Metropolitan policies?

These and other issues will be addressed in this report.

This study, as part of the Metropolitan Plan Review, is a background paper focussing on policies and statements which relate to industrial areas.

Specifically, the study's purpose is:

(1) to review Metropolitan Official Plan policies relating to industrial areas;

(2) to identify implicit assumptions of the Metropolitan industrial policy;

(3) to review our experience in the administration of the Metropolitan Plan industrial policies;

(4) to describe and analyze the characteristics of industrial areas in Metro;

(5) to identify land use, development and employment trends in industrial areas; and,

(6) to suggest changes to Metropolitan policies concerning industrial areas.

1.2 Background

The development and location of industrial areas in Metropolitan Toronto have been influenced by transportation and technological innovations. Access to transportation and the limited physical mobility of the work force initially constrained industry to locate in a zone adjacent to the waterfront. Later, with

the development of the railway, industry expanded to the central area of the various communities within the geographic area now comprising Metropolitan Toronto, i.e., around the rail facilities in communities such as Toronto, Weston, Mimico and Leaside.

Following World War II, a number of factors favoured the move of industry out of the central city areas. The advent of car ownership and a change in the mode of goods movement from trains to trucks enabled industry to locate along the major arterial roads and eventually in proximity to the developing freeway network. As a result of the adoption of large scale production technology, the types of buildings and the amount of land required by industry changed. Industries began to seek large tracts of inexpensive land in suburban locations.

The 1959 Draft Metropolitan Official Plan set the pattern for the development of employment areas in Metropolitan Toronto. It established the major new industrial lands for development next to the new suburban housing market where rapid population growth was taking place. The industrial lands were to be located to take advantage of rail facilities, arterial roads, new expressways and the airport.

The development of industrial buildings in the suburbs followed new specifications which ultimately became standard - that of a large low rise building sitting on a large, well landscaped lot and providing surface parking areas sufficient to accommodate employee automobiles and truck deliveries. From the 1950's to the mid-1970's, suburban industrial areas developed in this fairly uniform pattern, while some industries remaining near central areas struggled to continue operations.

In the past decade, global trends leading to changes in the metropolitan economy have had profound impacts on the development of industrial areas. These changes have a direct relationship to planning the physical use of land in industrial areas. Metro and the area municipalities are re-examining their policies for industrial areas to recognize the changes transforming our economy. This report proposes a general guide to structure the future development of industrial areas as major elements of the future metropolitan economy and employment base.

2.0 METROPOLITAN POLICIES FOR INDUSTRIAL AREAS

2.1 Conceptual Strategy

Metropolitan Toronto's urban structure is characterized by a densely developed Central Area and less densely developed suburban areas, with land use patterns reflecting the grid of arterial roads and the various topographical features of the valley systems. Building on existing development patterns the 1980 Metropolitan Official Plan sets out an urban economic structure which is to accommodate the anticipated employment growth. Industrial areas are one of the types of employment areas. Other types include Metropolitan Centres, Office Parks and other areas of employment. The Plan requires the support of area municipalities in achieving the urban structure and it is intended that their Official Plans and zoning by-laws will be complementary to and implement the policies and objectives of the Metropolitan Official Plan.

2.2 Specific Policies on Industry and Industrial Areas

Section 3 of the Official Plan sets out a concept of industrial areas and general policies on industry.

Section 3.E states:

> "**Council** shall attempt to increase industrial job opportunities in designated industrial areas. The land needs for industrial activities require special attention to maintain their integrity for industrial purposes. Accordingly, **Council** supports policies to limit the intrusion of additional incompatible or competitive uses in such areas, while recognizing that some lands now designated as industrial may reasonably be redesignated for other uses. Consistent plans and policies at the **area municipal** level are required to protect the integrity of industrial lands for industrial uses while providing for the rational redesignation of industrial lands for other uses when and where justified as described in Section 5, Sub-section D of this **Plan.** Office uses should be encouraged to locate in **centres.**"

Analysis of this section indicates that the Plan:

- sets a goal of increasing industrial jobs;
- identifies special land needs for industrial activities;
- has an objective of limiting the development of non-industrial uses in industrial areas;

- indicates that the future demand for industrial land is unclear;
- provides a means of implementation by requiring area municipal involvement; and
- in not prohibiting offices from locating in industrial areas but encouraging them to locate in centres this policy relates office development to the "Centres" policy.

These general policies are elaborated upon by more detailed policies for industry found in the section on Employment Activities. Section 5.D states:

"1. For the purpose of the **Plan, Industrial Areas** are those lands designated for Industry in **Area Municipal** Official Plans as amended from time to time by **area municipalities.**

2. The policy of **Council** with respect to Industrial Areas will reflect the following objectives:

   a. to protect and enhance the viability of existing industrially designated areas for industrial purposes;

   b. to require that, in the ongoing development of **industrial areas,** office development should be limited in density and controlled in location and extent so as to be compatible with activities related to industrial uses and to be otherwise consistent with the **Plan;** and,

   c. other commercial uses, whether or not providing a service to an **Industrial Area** and its workers, should be grouped in a location which adequately accommodates the traffic generated and/or is most accessible to the service area.

3. In considering amendments to **Area Municipal** Official Plans for the redesignation of existing industrial land to non-industrial use, the **Corporation** shall have regard for:

   a. the importance of the site in maintaining a supply of industrial land adequate to accommodate approximately 45 000 additional jobs projected for the period 1976-2001;

   b. the potential impacts of the proposed uses on the continuing viability of existing or planned industrial development in the vicinity of the site;

   c. the implications of redesignating **Industrial Areas** which are well situated in relation to rail lines, **expressways,** airports, the Toronto Harbour and Port; and,

   d. the accessibility of **rapid transit** facilities."

In examining this policy, the following is noted:

- No one comprehensive definition of "industry" has been established at the Metropolitan level.

- Metropolitan Toronto has left the designation of industrial areas to area municipalities and set out criteria to be taken into account in considering the redesignation of industrial land to non-industrial uses.
- Industrial areas are to accommodate a target of 45,000 additional jobs (industrial and other) during the period 1976-2001.

Offices and other commercial uses may be permitted but their development limited. The Plan provides for the structuring of commercial uses. The location and density of offices and location of other commercial uses are to be controlled, especially as they relate to transportation accessibility and compatibility with industrial uses. While a structure is suggested, its implementation has been left to the area municipalities.

The primary objective of the Official Plan policy respecting industrial areas is to ensure that the relatively limited supply of designated industrial land is used mainly to accommodate future industrial employment by protecting industrial lands for industry, limiting the development of non-industrial uses and limiting the amount of industrial land redesignated to other uses. The basis of this general policy framework is rooted in the various background studies and reports to the Official Plan.

2.3 Office Parks

Office Parks, which originally developed within some industrial areas, resulted from a demand for suburban office development often related to expressways providing direct access to the Central Area. They also served a need for companies wanting lower cost "park-like" corporate settings as an alternative to the expensive locations and congested character of the Central Area.

The Metropolitan Official Plan identifies six Office Parks: four are located in North York along the Don Valley corridor, one in East York and one in Etobicoke (see Figure 2).

Section 5.C.2 of the Plan outlines detailed policies for Office Parks. It states:

> "**Area Municipal** official plans and zoning should be amended as may be necessary to:
>
> a. define the outer limits of the **office parks** designated by Figure 6;

b. within the limits defined, control the amount of office development that may be anticipated so that the traffic generated can be reasonably accommodated by the transportation facilities available or to be provided;
c. encourage the development of a variety of compatible uses within the defined **office park** area;
d. attempt to establish a roadway pattern and design that can accommodate **transit** facilities;
e. require that the siting of buildings is such as to encourage public use of **transit** facilities;
f. limit the density of office development on any industrially designated lands adjoining the defined **office park** area in accordance with Section 5.D of this **plan.**"

The policy aims to restrain office development from encroaching further into the surrounding industrial areas, encourage a variety of compatible uses within Office Parks and control development in relation to density and accommodation of transportation facilities.

While most Office Parks continue to serve as locations for industrial activities, they exhibit a different character from that of industrial areas. Over 70% of the employment and about 50% of the land use in Office Parks is office. Industry accounts for only 17% of employment and 35% of land use.

Some of the Office Parks, such as Consumers Road and Flemingdon Park, clearly have an office character. Duncan Mill is composed of office and industrial land use but mainly office employment. The Airport Strip has a hotel and office character as well as a significant level of industrial employment. Parkway-Finch has a mixed industrial and office character while Thorncliffe Park also includes other non-industrial uses.

Although most Office Parks originated as industrial areas, their development has, to varying degrees, encompassed non-industrial activities. Some have little resemblance to their industrial origins, while others have a mixed industrial-office character. An examination of Office Parks is included in a forthcoming report on "Offices".

1 AIRPORT STRIP

2 PARKWAY-FINCH

3 CONSUMERS ROAD

4 DUNCAN MILL

5 FLEMINGDON PARK

6 THORNCLIFFE PARK

FIGURE 2

DESIGNATED METROPOLITAN OFFICE PARKS
(From Figure 6 of the Metropolitan Official Plan)

3.0 ADMINISTRATION OF THE 1980 OFFICIAL PLAN: THE PRACTICAL EXPERIENCE

3.1 Introduction

The policies contained in the 1980 Official Plan have served to guide revisions to area municipal Official Plan and zoning policies which in turn affect development of industrial areas. This chapter will outline the Metropolitan experience in the administration of the Official Plan policies respecting those areas. This experience has led us to identify a number of recurring subjects which can be grouped under the following:

- the definition of "industry" and permitted uses in industrial areas;
- accommodation of growth and redesignation of industrial land;
- separation of incompatible uses;
- the development of secondary and unanticipated uses;
- control of building density; and,
- transportation accessibility.

These topics will serve as the basis for the structure of this chapter.

3.2 The Definition of Industry and Permitted Uses

A. Basis for the Current Policy

In planning terms, industry as a land use has generally been defined to include only manufacturing, processing, warehousing and storage activities and, in some systems, utility and transportation related uses. Specific areas were designated "Industrial" in which these uses would locate.

Since the 1950's however, the definition of industry and the types of uses permitted in industrial areas have undergone major changes.

At the Metropolitan level, the definition of industry and what uses should be permitted in industrial areas has varied in response to issues and assessment of those issues in different times. This is indicated in the differing definitions adopted in various Metropolitan planning reports.

The 1959 "Draft Official Plan of the Metropolitan Toronto Planning Area" referred to industrial lands being used for traditional manufacturing, warehousing and storage uses as well as limited commercial and institutional uses serving the industrial area (Metropolitan Toronto Planning Board, 1959, p. 137). The 1966 "Metropolitan Plan" adopted a broad definition of industrial use to include manufacturing, warehouse and storage uses as well as service industries, research laboratories and truck terminals (Municipality of Metropolitan Toronto, December 1966, p. 6). In addition to these industrial uses, a variety of commercial uses including wholesale and retail trade, offices, service stations, automotive uses, service uses, hotels and restaurants were to be permitted in industrial areas.

"Concept and Objectives", a background report to the 1980 Metropolitan Official Plan, identified industrial uses as including:

> "manufacturing, warehousing, wholesaling, storage, processing, research and development facilities, industrially oriented services (e.g., dry cleaners and laundry plants, safety supply firms, auto dismantlers, etc.) related transportation and utility facilities and operations and offices directly associated with the above industrial uses". (M.T.P.D., Concept and Objectives, p. 100)

Although the overall intent was to protect industrial areas for industrial uses as defined above, the report also recognized that certain non-industrial uses including restaurants, banks, variety stores and professional offices (e.g., doctors, dentists, lawyers and accountants), intended to serve the needs of industrial firms and employees may be permitted in industrial areas (Ibid., p. 100-101). Thus, industrial areas were to be for industrial uses (defined in the traditional sense) and limited non-industrial uses providing a service to the industrial area.

The policy concept reflected a social goal of preserving existing and ensuring future gowth in "blue collar" employment to maintain the variety and scope of employment opportunities for Metropolitan Toronto residents. The implicit need to control the encroachment of other uses, particularly offices, was to be further addressed in the new Official Plan.

Table 1:

AREA MUNICIPAL OFFICIAL PLAN INDUSTRIAL DEFINITIONS AND PERMITTED USES AS OF 1980

	Toronto	Scarborough	Etobicoke	North York	York	East York/Leaside
Definition of Industrial or Industry	- Industrial includes uses such as, but not limited to, processing, repairing, storage, warehousing, manufacturing, transportation and communications operations, protection and utility premises and undertakings				Industry is defined as manufacturing, storage uses, service industries, warehouses, research laboratories and truck terminals	Industrial Use: - East York extracting or processing of raw material, manufacturing, processing and storage - Leaside manufacturing, includes processing of goods and raw materials and storage
Permitted Uses in Industrial Areas or in Industrial Designation	- Industrial uses - Incidental uses - Social Services - Recreation Facilities Public Uses, e.g., parks police station, firehall, government office, public scales, city yard, harbour works, sewage disposal plant	- industrial, scientific, warehousing, manufacturing, storage, technical research and development uses - Incidental uses - automobile service stations	- manufacturing, extraction and processing of goods and materials, storage of goods, repair workshops, and a horse racing track - Ancillary uses - office development in a few specific locations - caretaking residence	Primary Uses: - Industrial uses including offices, manufacturing, warehousing, service industries - Secondary uses	- Industry - Ancillary/Incidental Uses	- Industrial uses - Accessory uses
Incidental, Accessory, Secondary or Ancillary Uses	Incidental Uses: - restaurant, variety store, administrative offices, banks, parking lots, garages and a caretaker's residence - limited commercial, community, retail and institutional uses	Incidental Uses: - retail offices and other commercial uses	Ancillary Uses: - commercial, public and institutional facilities which provide a service to industrial establishments or employees - commercial recreational uses - caretaking residence	Secondary Uses: - research labs, automotive uses and technical schools, commercial uses providing a service to the industrial area - motels and hotels - commercial recreation uses - public utility, government uses and work yards - transportation facilities - caretaker's residence - retail-warehouse and assembly hall - other Secondary uses	Ancillary/Incidental Uses: - commercial and other uses provided they are warranted to serve the industries	Accessory Uses: - Leaside offices, cafeterias, restaurants and banks

The current Metropolitan Toronto Official Plan has an implied definition of industry as being manufacturing, warehousing and processing activities. It also permits commercial and office uses in industrial areas the specifics of which would be left to the area municipalities. Table 1 outlines the definition of industry and permitted uses in industrial areas by each area municipal plan as of 1980 (when the Metropolitan Toronto Official Plan was adopted).

Although the specifics of the area municipal plans vary considerably, there has been a degree of concensus that industrial areas should be protected from the encroachment of non-industrial uses. Only three area municipal plans provided a definition of industry (see Table 1). All the plans outlined the uses permitted in industrial areas or under the industrial designation. In addition to permitting traditional industrial uses (manufacturing, processing and warehousing uses), **there was also permission for a range of non-industrial uses in industrial areas which were incidental, secondary or ancillary to the industrial use or served the industrial area.** Office uses were included as "permitted uses" in the North York industrial designation and in certain industrial categories of Etobicoke's zoning by-law. Commercial uses not directly related to the industrial use were generally not permitted, except by the North York and Toronto Plans where other types of controls came into play.

An important distinction made in the City of Toronto's policy was that although it was important to preserve industrial land, these lands should be identified on the basis of their continued viability for industrial uses. A major result of the Central Industrial District amendments was the substantial reduction in the amount of land designated for industry. The industrial policy also allowed a 25% office component in new or renovated industrial buildings to assist in the preservation of existing space and to encourage the development of new industrial space.

B. The Changing Nature of Industry Affecting the Industrial Definition

Computer based technological innovations coupled with economic factors are changing the shape of industry. They are leading to a restructuring of the industrial sector, the creation of a whole new range of advanced industrial activities and growth of the service sector. The background report, titled "The

New technologies, such as "robotics", are changing the nature of industry.

The Massey Ferguson lands, an old industrial area, is to undergo redevelopment to new industrial uses including research and development, computer services, business and technical services.

Changing Metropolitan Economy" details these changes. (Metropolitan Toronto Planning Department, 1986).

Development in industrial areas reflects the changing economy. This Department has reviewed a number of proposals which required a broader interpretation of the traditional and inherently limited definitions and policies for industrial land use. For example, the Department recently supported an amendment to permit amongst other industrial uses, hi-technology, service and computer related activities on the Massey Ferguson industrial lands on the basis that this reflects changes in the manufacturing and service employment sectors in the Metropolitan area (City of Toronto O.P.A. No. 382).

It is becoming increasingly difficult to classify the new technology based activities when determining the definition of industrial uses for Official Plan purposes. For example, a proposal to permit a taxation data centre in an industrial area was supported by this Department (North York DPZ 84-31) on the basis that data filing and processing could be considered quasi-industrial similar to a warehouse storage operation.

In food, furniture and appliance retailing, new business practices are resulting in combining on one site both the retailing and warehouse functions. In inspecting these operations it is difficult to decide whether the retail or warehouse characteristic is dominant. As part of the assessment of such cases we have pragmatically asked and answered these questions:

- Is the proposed use in response to a perceived service demand of Metro residents?
- Is the use appropriate in a shopping centre or along a retail strip?
- Is its operation at the proposed location compatible with existing or future industrial activities?

Due to the absence, in many cases, of sufficient amounts of appropriately located commercial lands, support to such quasi-industrial uses in industrial lands was given.

C. Recent Policy Initiatives

Policy initiatives by area municipalities from 1980 to September 1987 indicate a broadening in the industrial definition and move toward permitting diverse employment uses to locate in industrially designated areas. These initiatives were studied in the preparation of a Metropolitan position.

Toronto

With Metropolitan support, Toronto has amended its Official Plan for several areas in the King-Spadina district. These amendments (Nos. 353, 355, 360) expand the list of permitted industrial uses to include the following: computer and related services, publishing and printing establishments, designers and performing arts studios, consultant offices, telecommunications and broadcasting establishments, fashion design and modelling services, security service, miscellaneous service industry uses (e.g., answering service) and commercial schools. Consideration of these amendments suggested **a broadening of the "industrial" definition to reflect the economic potential of an industrial area which had become obsolete to "traditional" industry.**

In September 1986 Toronto passed an amendment to the Official Plan (No. 382) and zoning by-law (No. 694-86) for the Massey Ferguson lands, another aging industrial area containing obsolete buildings. The uses permitted under the industrial designation have been expanded to include a number of uses which operate in a business environment but may be seen as industrial in nature. **These include hi-tech research and development activities, advanced technology production, computer services, and a range of business and technical services.** This Department stated the amendment was necessary in order to revitalize the physical and economic structure of the area. This further recognized the need for more lands and buildings to meet the growth of a service based economy.

Implicit in these recent amendments is the conclusion that some older industrial areas are no longer viable for traditional industrial operations and that new industrial uses and **other employment generating activities may now be appropriately considered to be industrial.**

North York

Problems of definition which have been addressed with North York Official Plan and zoning amendments include: major food retailing (for Knob Hill Farms and Highland Farms) where the bulk storage of merchandise would occur in the retail space and many building characteristics relate to industrial construction characteristics; a data processing centre whose activity would largely occur in an office-like setting but whose operation was akin to a factory for the production and distribution of data; and banquet halls whose mass production of food in facilities also used for catering relates more to food processing than a restaurant operation. **Metropolitan support in part recognized the quasi-industrial aspects of the proposals, the compatibility of the proposals in the particular areas and the relationship of such developments to Metro's economic development, and the needs of residential communities.**

Recent initiatives are leading to a tightening of control and the structuring of uses in industrial areas. North York Amendment No. 258 sets an objective of protecting viable industrial areas for industrial uses, but states that some industrial lands may be redesignated for other uses. This is a recognition that North York has very little vacant industrial land and pressures have developed to establish other uses in some industrial areas. Official Plan Amendment No. 261 (adopted by North York Council in 1984 but not yet approved) limits office development to industrial lands abutting arterial roads and further limits office floor area to a maximum of 40 000 square feet or a floor space index of 1.0, whichever is the lesser. A revision to the Office Policy proposes to delete the 40 000 square foot limit.

The recent Industrial Policy Study (1985) proposes to similarly structure the development of uses in industrial areas. It proposes to restrict office and other commercial uses such as retail-warehouses, hotels and food outlets, to arterial road frontages, reserving the interior of industrial areas almost exclusively for industrial, complimentary commercial uses such as banks, restaurants, banquet halls and accessory retailing and institutional uses. The recent Retail and Service Commercial Policy Study (1987) proposes to redesignate the industrial lands fronting Finch Avenue, Keele and Dufferin Streets to a Commercial designation to reflect the commercial nature of these lands.

Four industrial areas which were identified by the Metropolitan Official Plan as "Office Parks" have been designated as "Business Parks" by Official Plan Amendment No. 261. Both industrial and commercial uses are permitted in these areas.

Scarborough

Recent initiatives seek to structure and permit a greater range of uses in industrial areas. Official Plan Amendment No. 591 (approved in 1984) designates certain industrial lands along major roads and along Highway 401 as Business Districts where industry, offices, business services and social service uses may be permitted. These industrial lands were identified on the basis that they enjoy good accessibility and visibility as well as having the potential to be served by a high level of public transit. The density of development in these areas is to be determined by the capacity of the transportation system. A recently approved Secondary Plan for the Milliken Industrial District (O.P.A. No. 653) establishes a structure for the development of uses in the area. It permits industrial, office, retail, service and recreational uses and community facilities along the major road frontages of the area while generally maintaining the interior of the area for industrial and recreational uses and day care nurseries.

Scarborough is currently reviewing its Official Plan policies for employment areas including industrial areas. The City appears to be moving to maintaining the interior of industrial areas primarily for industry and permitting a mix of activities including industry and offices along the major road frontages.

Etobicoke

Official Plan Amendment No. B12, approved in 1981, permits limited office uses in all industrial areas and also identifies several locations where major office development may be permitted. The conflict between the Official Plan provisions and those of the Zoning By-law which permits office development as-of-right in the IC1 industrial zone is an ongoing concern. This should be resolved to bring Etobicoke's zoning into conformity with both the Etobicoke and the Metropolitan Official Plans. Their current Official Plan review is anticipated to address this matter.

York

The City recently completed a review of it's industrial sector and adopted a new policy which recognizes the diversity of industrial locations (O.P.A. 74). While the aim is to preserve the City's concentrations of industry, **the new policy indicates that a range of uses which are supportive of industry and employment activities may be appropriate at some locations. The definition of industry is broadened to include new forms of business enterprise such as data processing, film and communications.** The policy designates areas to be preserved for industry, areas for the continuation of traditional industries and some transitional areas which are regarded as being more suitable or viable for redevelopment to non-industrial uses. Locations generally along arterial roads may be appropriate for industry, offices and other commercial activities such as hotels, banquet halls, retail-warehouses, convenience stores and recreational facilities. A range of uses which provide a service to industry and employees such as day nurseries, business services, banks, restaurants and offices may be permitted throughout most industrial lands.

East York

The Secondary Plan for the Leaside/Thorncliffe Park Industrial Area permits industrial uses, offices and business services along Eglinton Avenue, Millwood Road and the Don Valley, and along Overlea Boulevard. The Secondary Plan for the O'Connor Drive Industrial Area (O.P.A. No. 18) generally permits manufacturing uses, services, offices, retail and institutional uses along O'Connor Drive. **A recent Draft Official Plan** (April 1986) **proposes to permit research facilities, data processing, industrial uses and accessory offices in most of the O'Connor Drive Industrial Area and along arterial roads of the Leaside/Thorncliffe Park Industrial Area.** Business and professional offices and business services including banks, restaurants, day nurseries, etc., are proposed to be permitted in the Thorncliffe Park Office Park and at a few strategic locations in the Leaside Industrial Area.

This review of recent initiatives by area municipalities indicates that:

(1) Generally, area municipalities are expanding the range of uses permitted in industrial areas or under the industrial designation;

(2) In the case of North York, the permissiveness of the industrial policies has been tightened in terms of the densities and locations of permitted uses;

(3) York, North York and Scarborough are proposing to structure uses in industrial areas maintaining the interior mainly for industry and a limited range of other uses. Arterial road frontages are intended for a mix of activities;

(4) Area municipalities generally limit the types of retail activities permitted in industrial areas and restrict these uses to arterial road frontages. In North York banks, restaurants and banquet halls are proposed to be permitted in the interior of industrial areas. Retail uses are generally not permitted in East York, except for business services at specific locations.;

(5) It is recognized that some industrial lands may no longer be appropriate or viable for industry and should be redeveloped to non-industrial uses or re-designated to a non-industrial designation.

The changes identified reflect a tendency in planning controls to respond to economic and technological innovations and a recognition that the rapidly growing service sector requires land for expansion which limited commercially designated lands are unable to accommodate. The traditional definition of industry which equates it to manufacturing, processing and warehousing activities is not of great assistance in guiding future change and development.

3.3 Accommodation of Growth

A. Growth Projections

Accommodating projected employment growth in industrial areas has been a concern of Metropolitan policy at least since the 1959 Draft Plan which

designated a reserve of land expected to be large enough for industry beyond what was needed to 1980. The 1976 report "Concept and Objectives" noted that area municipalities were permitting non-traditional industrial uses to locate in industrial areas and expressed concern over the competition for a decreasing supply of vacant industrial land and accommodation of projected industrial growth. It forecast an increase of over 102 000 factory/warehouse jobs which approximated 23% of total employment growth during the period 1974-2001. (M.T.P.D., May 1976, Schedule 4.)

Subsequent revisions to these projections have significantly reduced the projected future growth of traditional industrial jobs. Current projections to the year 2011 indicate a decline in manufacturing/warehouse employment and a significant increase in office and service employment (See Table 2). These projections are relevant to Official Plan policy respecting the redesignation of industrial lands.

Table 2:

TOTAL EMPLOYMENT BY TYPE IN METROPOLITAN TORONTO PROJECTED TO 2011

	Office	Retail	Service	Manuf. & Whse.	Instit.	Other/ Footloose	Total
1970	238 294	114 691	45 090	367 114	108 355	47 940	921 484
%	25.9	12.4	4.9	39.8	11.8	5.2	100.0
1985	495 520	136 733	147 787	257 390	140 212	6 561	1 184 203
%	41.8	11.5	12.5	21.7	11.8	0.6	100.0
2011	728 980	146 638	185 976	229 720	175 405	18 859	1 485 586
%	49.1	9.9	12.5	15.5	11.8	1.2	100.0

Source: M.T.P.D. Metro Facts: Small Area Projections to 2011, p. 11
M.T.P.D. Employment Projections, December 1984, Table 9

B. Redesignation of Industrial Land

The Metropolitan Official Plan recognizes that some lands designated as industrial may be redesignated for other uses. A brief review of lands redesignated to or from industrial use during the period 1976 to 1985 indicates that of a total of 77 redesignations processed during this period:

- Some 160.47 hectares of industrial lands were redesignated to non-industrial designations:
- 10 were to commercial designations involving 37.92 hectares;
- 39 redesignations totalling 86.5 hectares were to industrial-commercial or site specific designations (i.e., office, retail-warehouse, superstore uses);
- 11 were to other designations (i.e., residential, institutional) for a total of 36.05 hectares.

However, there were 17 redesignations from non-industrial to industrial designation totalling 223.02 hectares. As a result, **during the period 1976 to 1985 redesignations have actually increased the total inventory of industrial land by 62.55 hectares** (see Table 3).

Due to difficulties in data tabulation, the figures do not include significant redesignations in the City of Toronto. The Toronto Official Plan and zoning by-laws are quite broad permitting a mix of non-industrial uses in the industrial designations. In addition, a significant proportion of some industrial sites can be developed for non-industrial uses. As a result, in Toronto it is often difficult to determine whether an industrial site has been redesignated.

It should be noted, that the fact that a site may be designated "industrial" does not necessarily guarantee its use for traditional industrial uses. As discussed in section 3.2, municipal plans permit a wide variety of industrial, commercial, retail and office uses within the industrial designation.

Table 3:

INDUSTRIAL REDESIGNATIONS

June 1976 to May 1985

Municipality	Industrial to Commercial		Industrial to Ind./Comm. or Site Specific** Development or Additional Uses		Industrial to Other Designation		Non-industrial to Industrial Designation		Total Redesignated Land	
	No.	Site Area (ha)	No.	Site Area (ha)	No.	Site Area (ha)	No.	Site Area (ha)	No.	Site Area (ha)
Toronto*	-	-	-	-	-	-	-	-	-	-
East York	-	-	1	-3.30	-	-	-	-	1	-3.30
York	-	-	2	-1.09	2	-2.70	-	-	4	-3.79
Etobicoke	4	-29.60	6	-19.99	-	-	5	+65.85	15	+16.26
North York	3	-2.25	20	-40.30	3	-6.31	9	+87.68	35	+38.55
Scarborough	3	-5.80	10	-21.82	6	-27.04	3	+69.49	22	+14.83
Metropolitan Toronto	10	-37.92	39	-86.50	11	-36.05	17	+223.02	77	+62.55

* Data for Toronto could not be tabulated.

** Data is available for the three separate redesignations.

Source: Metropolitan Toronto Planning Department, July 17, 1985

Based on trends in the Metropolitan economy and recent employment projections, it appears Metro will experience little growth in traditional industrial employment. However, the concern of maintaining sufficient industrial lands to accommodate future industrial growth remains. What needs to be decided is the extent to which other economic activities may be accommodated provided care is taken to structure land use to meet both the needs of traditional industry and the more diverse requirements of an expanding economy.

C. Redesignation Process and Criteria

Section 5.D.3. of the Official Plan sets out Metropolitan policy on proposed amendments to area municipal plans to redesignate existing industrial land to non-industrial use. The policy provides that in considering the redesignation of industrial land a number of criteria shall be examined. This provides the basis for consideration of the proposal by the Department and if necessary by the Economic Development and Planning Committee and Council. The specific criteria are noted and discussed below.

a. the importance of the site in maintaining a supply of industrial land adequate to accommodate approximately 45,000 additional jobs projected for the period 1976-2001;

Generally, the distribution of potential employment growth in the Plan resulted from a "top down" allocation of an overall Metropolitan employment increase. This began with a relatively well established development scenario for the Central Area and Major Centres and progressed through to less well documented potentials for other sectors including industrial areas. The 45,000 figure should not be seen as an exact allocation but rather as an approximation of development potential assigned within the broader employment scenario of the Plan. In addition it should be noted that the Plan does not categorically state that the 45,000 additional jobs relates only to "industrial jobs". Rather, this figure refers to all jobs projected to locate in industrial areas based on conditions and trends of the period.

In reviewing redesignation proposals, the Department addressed the incremental job growth figure of the redesignation policy by estimating the employment which would result from the proposal. This figure was then compared with the estimated employment from traditional industrial jobs which may have been anticipated in the area. The result of this exercise generally indicated that the proposal would in fact increase employment. Our experience has been that the majority of redesignations involve small sites which individually have little impact on achieving the long term employment target. Due to the broad brush character of the employment projection and the difficulty in assessing the implications of an individual redesignation proposal with respect to the larger employment goal, the relevance of the employment projection as a criterion for a site specific redesignation proposal relates to larger areas proposed to be redesignated to non-employment uses.

b. the potential impacts of the proposed uses on the continuing viability of existing or planned industrial development in the vicinity of the site;

Metropolitan concerns regarding the impact of proposed redesignations on the surrounding industrial area involve potential future land use conflicts. The consideration by staff of applications to redesignate industrial lands have focussed on the immediate impacts on adjacent uses and the potential to undermine the long-term stability of the larger industrial area. The Department has attempted to identify impacts on existing manufacturing operations which may arise if a new use pressures the existing industry to control or eliminate noxious aspects of their normal operation which may constitute a nuisance or irritant to the new development. Metropolitan policy has been to structure development so as to reduce or eliminate these potential conflicts. If this was not practicable the proposal was not supported.

c. the implications of redesignating **Industrial Areas** which are well situated in relation to rail lines, **expressways,** airports, the Toronto Harbour and Port;

Various transportation facilities are seen by the Official Plan as playing a major role in supporting industrial uses. Increasingly, accessibility to and movement along certain transportation facilities such as arterial roads and expressways are critical to most industries.

But certain transportation facilities of benefit to industry are also of great importance to other potential users of industrial lands. For example, Pearson International Airport is associated with tourism, hotel and office development to name a few. Office uses have developed in association with the expressway system and certain retail uses (retail-warehouses and bulk food stores) have shown a preference for sites along major arterial roads. Where a trade-off between immediate non-industrial development or preserving a vacant site in anticipation of possible future traditional industrial development must be made, the priority is often given to the competing use especially as this provided more jobs.

d. the accessibility of **rapid transit** facilities.

Relatively few industrial areas have good accessibility to rapid transit facilities. Proposals to redesignate industrial land along rapid transit facilities have occurred in the following areas: Islington/Kipling in relation to the designated Centre; the expansion of the financial district to the railway lands; and expansion of the Scarborough City Centre east and west into the adjacent industrial areas. In addition, Scarborough Official Plan Amendment No. 619 relates intensification of office development directly to access to rapid transit stations.

These redesignations are clearly oriented to office uses and not traditional industrial uses. Industrial areas, as opposed to Centres are not intended to develop at significant densities or as high employment concentrations. The redesignation of industrial areas around rapid transit facilities for more intensified development really has to do with office, retail and institutional uses. Section 5.E. of the Plan pertaining to other areas, specifically encourages such development.

This also relates to an objective of the Plan to structure development to maximize utilization of the service and transportation infrastructure. Therefore, consideration should be given to including a criterion which relates the redesignation to lands within a specified distance from a rapid transit station.

In summary, modifications to the redesignation criteria in the Official Plan would assist in the examination of redesignations with a greater relationship to current industrial development needs, other employment activities and strategic elements of the Plan.

3.4 Separation of Incompatible Uses in Industrial Areas

The nineteenth century picture of industrial activity invokes images of black chimney smoke, noisy machinery, noxious odours, dirty buildings, various forms of pollution and a total absence of trees or other vegetation. These negative images carried over into the twentieth century when industrial zoning practices sought to shield the rest of the community from incompatible but necessary manufacturing and processing operations and open storage activities. Various classifications of industry evolved in planning to address the matters. Consequently classifications such as "heavy" and "light" became common in both master plans and zoning by-laws. Planning policy generally sought to separate industrial areas from residential lands by other zones such as "commercial", "institutional" and "open space". **However, as the characteristics of the Metropolitan industrial economy have changed so too have the need and utility of the traditional means of separating industrial activities from other urban land uses.**

Our experience indicates that for the most part new industries and a great portion of older ones found in Metro are not noxious and unpleasant. They locate in aesthetically pleasing buildings, store their goods within enclosed structures, and have well maintained sites with great attention to landscaping. Only a very small group of industries are still associated with unsightly or noxious aspects. These are subject to provincial pollution control standards with new development subject to Section 40 agreements involving site plan control. So long as the location of these uses is controlled, then the separation of different industrial and employment uses in industrial areas is no longer as problematic. The needs of these special industrial uses should be looked at separately from most other industries. This in fact is the trend suggested by area municipal planning reports.

There are two common elements found in this trend:

Firstly, is the problem of the appropriate land development in an industrial area where such land is contiguous to another basic land use, i.e., the edge of an industrial area adjacent to a residential neighbourhood or commercial zone. In such locations community pressures and sound planning tend to support the insertion of an activity which buffers the surrounding area from the remaining industrial land. The proposed development may be for an office use with ancillary retailing or a special retailing facility not normally associated with suburban malls or inner city commercial strips. Frequently such proposals are for a site on a major road. As a result of a number of such developments the periphery of industrial areas takes on characteristics different from the interior. This gradual structuring of industrial areas has been commented on and supported by this Department as a means of implementing Section 5.D.2 of the Metropolitan Official Plan (which calls for area municipalities to structure office and commercial uses in the industrial areas).

Secondly, is the evolving mix of uses permitted in the interior of industrial areas. We have found that new kinds of industry as well as new uses which are unrelated to industry such as catering establishments, auto repair services, fitness centres and small retail establishments are locating in the interior of industrial areas. A range of 'clean' industry is developing and altering the image of industry. New industrial types ranging from service to office uses are not necessarily incompatible with the industrial designation nor the commercial and residential uses. These new uses are generally not noxious and can produce positive impacts on adjacent residential and commercial areas. Non-noxious industries are locating next to residential and commercial concentrations and non-industrial uses are locating within traditional industrial districts. Modern industrial buildings are clean, well landscaped, present a pleasing appearance and often look like office buildings. These new prestige industrial areas developed with high performance standards, are generally seen as compatible with other employment oriented land uses and are generally "good neighbours" to nearby housing.

In addition, industrial firms have found that they cannot develop in isolation. A demand, by industry, has grown for input services such as financial, data

processing and business services. The work force is also demanding a variety of personal services such as day care, restaurant, banks, medical centres and recreational facilities next to their workplace.

In attempting to balance these factors, a new structure of development in industrial areas is emerging. Recent policy initiatives by some area municipalities seek to limit or restrict competing non-industrial activities from the interior of industrial areas. At the same time, a consensus is developing to permit a range of commercial and industrial uses along arterial roads of industrial areas. This is evidenced by North York's Amendment No. 261 and that city's Industrial Policy Study (1985), Scarborough's Amendment No. 591, the approved Secondary Plan for the Milliken industrial district, and York's new industrial policy.

A common theme running through these recent initiatives is the emergence of a new structure in industrial areas. This structure generally maintains the interior of industrial areas for industrial and other non-competing employment uses and permits a greater mix of uses on lands along arterial roads. This Department has supported the creation of this structure.

This structuring of uses to reflect arterial road and non-arterial road locations has the following benefits:

- **lands along arterial roads offer high visibility for most commercial uses;**
- **the highest concentrations of employment are best accommodated on sites with appropriate access to arterial roads in close proximity to transit;**
- **commercial uses which generate the greatest automobile movements are located on the arterial roads thereby reducing any potential conflict with industrial uses on local roads in the interior of industrial areas;**
- **the private sector for its own reasons has tended to favour arterial road frontage for major non-industrial uses; and,**
- **concentrating change along arterial roads results in more stability for remaining industrial lands thereby helping to keep property costs lower in those locations and hence supporting industry.**

3.5 Changes of Scale and Importance

In the formulation of industrial area policies permission was normally provided for a number of non-industrial activities which were seen as:

i) supportive of the day-to-day operation of the area;
ii) providing a personal service to area employees; and,
iii) likely to occur in such a small scale and in such little frequency as to cause no particular problem to the industrial uses.

Such activities were sometimes categorized as "secondary uses".

In addition a number of entirely new land uses have developed which were not anticipated and hence no location was set-out in the development control process. Frequently these new uses sought site specific permission in industrial areas.

Addressing these secondary and unanticipated uses has been a recurring matter in relation to Metropolitan as well as area municipal industrial policy.

A. Secondary Uses

Generally, secondary uses have included commercial uses such as banks and restaurants which provide a service to the industrial area itself. It has also included office and retail uses which were accessory and incidental to the main industrial use.

In reviewing proposals to locate service-commercial uses in industrial areas, the Planning Department found that from a land use perspective the small area needed for these uses does not threaten the stability of the surrounding industrial area. Office uses in industrial areas were also seen as serving an important role providing business services for manufacturing industries. The growing demand for leasable office space however, is quite distinct and unrelated to most industrial development.

The extent however, to which secondary uses have developed in industrial areas was not anticipated and the range of commercial uses has gone beyond what was meant as secondary uses. Proposals to permit non-industrial uses in industrial

areas have been approved because they did not individually pose a threat to the integrity or existence of an industrial area nor create an unacceptable addition of vehicles for the road system. Also, Metropolitan policy itself acknowledged and permitted these retail and office uses. **But the cumulative effect of these intrusions has been significant. It has led to the extensive proliferation of secondary non-industrial uses. So extensive has this process been that in some areas these uses are, in fact, the dominant use.**

Metro Toronto and the area municipalities have identified some industrial areas in which industrial operations are no longer the dominant activity. The 1980 Metropolitan Official Plan designated several of the industrial districts along the Don Valley corridor as Office Parks. These areas have developed as major office concentrations and, in 1984, were designated as Business Parks by North York (Amendment No. 261).

It is likely that area municipalities will continue to be under pressure to permit a broader range of secondary uses in industrial areas. **In re-evaluating Metropolitan and area municipal policies there is a need to decide the extent to which secondary uses should be permitted and how to accommodate them in industrial areas.**

B. Other Unanticipated Commercial Uses

The extent to which a range of other commercial uses have located in industrial areas was not foreseen. (These are exemplified by fitness clubs, banquet halls, superstores, retail-warehouses, antique and farmers' markets.) These uses require parcels of land of a size generally not available in existing commercial areas. Frequently, not being able to compete or be accommodated in established retail centres, these uses have sought to locate in the industrial areas which offer good visibility, ample parking on site, cheaper land costs and rents, and good transportation accessibility.

Initially, municipal plans provided no guidance as to where to place these uses. As such uses did not strictly correspond to acceptable uses in residential or commercial areas, some area municipalities responding to site specific applications amended their Official Plans and zoning by-laws to accommodate

these "unanticipated" uses in industrial areas. In 1977, for example, North York established an industrial-commercial zone permitting retail-warehouses, assembly halls and banquet halls, subject to certain locational criteria.

In reviewing amendments to permit these uses in industrial areas, the position taken by this Department has been as follows.

- Some of these uses resemble industrial activity. They incorporate features found in traditional industry, e.g., warehouse, storage, and in some cases the use of rail spur lines for servicing.
- Many of these uses require a type of building structure and have a density which is more appropriate for an industrial location than a commercial area.
- Some need a prominent location along an arterial road frontage and a large site which is only available in industrial areas.
- Some fit with the broadening industrial definition.
- Existing Metropolitan policy lacked detailed criteria to provide a basis for opposition to applications otherwise found acceptable at the local municipal level.

While the Department has supported individual proposals for these non-industrial uses, the total amount of growth of these uses in industrial areas was not expected. The development of retail-warehouses and superstores is an example of this. Our experience has been that a significant number of redesignations to permit retail-warehouse uses in Metropolitan Toronto during the past decade have been on sites along non-arterial roads. Recently, proposals for superstores and food markets have also been approved for North York, East York and Scarborough. It is notable however that new policy initiatives by some area municipalities are restricting these uses to arterial road frontages.

The permission of some unusual businesses to locate in industrial areas reinforces the old image of industry as an "undesirable" use. Uses such as "adult entertainment parlours" are only permitted here by some municipalities. For example, in North York, the zoning by-law permits adult entertainment parlours

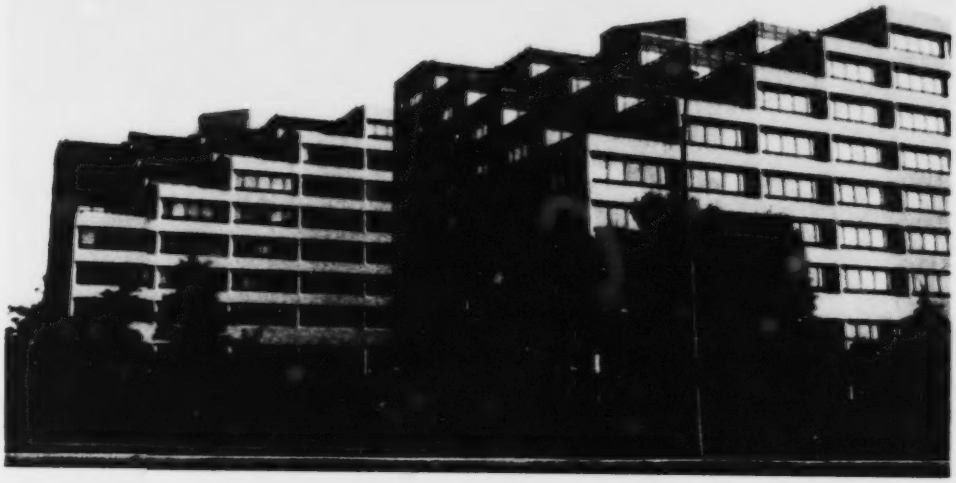
A range of non-industrial uses have located in industrial areas whose development was not foreseen.

Fitness Club

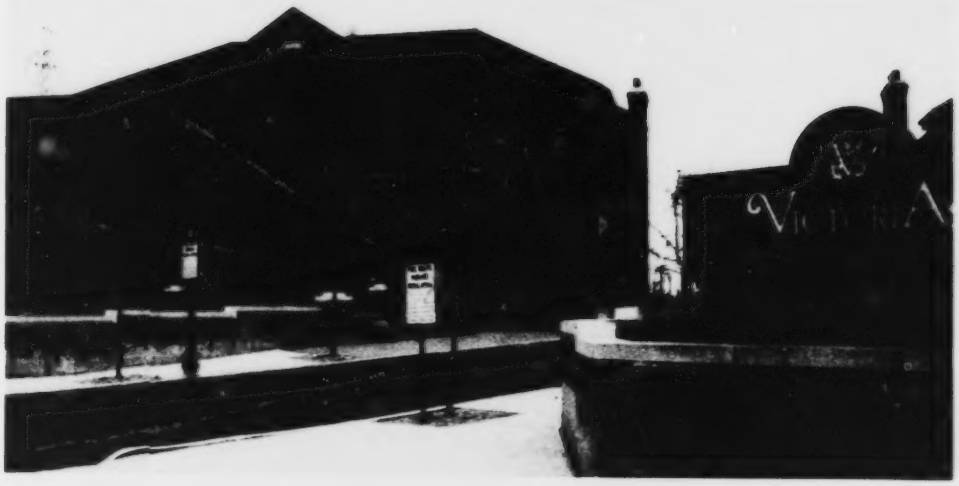
Retail-Warehouse

Banquet Hall and Restaurant

The introduction of office buildings have an impact on the density of suburban industrial areas.



Higher density office along Don Mills Road in the Don Valley/404 corridor.



"House form" office building located at McNicoll and Victoria Park Avenue in Scarborough is compatible in scale and design with nearby residential development.

Larger scale office building in the interior of an industrial area in Etobicoke is adjacent to an Office Park.

in all industrial zones and in that same municipality site specific zoning was obtained for a "rifle club". This indicates that industrial areas are still seen as a floating zone to accommodate uses from which the general community is to be shielded.

In reviewing development applications, the Department has taken the position that if a new commercial use provides and responds to a community need which cannot reasonably be accommodated in other areas, then subject to conditions which address site specific problems, these uses may be permitted in industrial areas in accordance with Section 5.D.2 of the Metropolitan Official Plan.

The influx of these commercial uses in industrial areas is expected to continue. Consequently there is a need to decide on the scale to which these uses should be developed.

3.6 Density and Transportation

With the resolution of issues of: the definition of "industry", the accommodation of projected employment growth, and new or unanticipated uses, the remaining Metropolitan planning concerns (in commenting on proposals to revise area municipal plans and zoning concerning industrial areas) have tended to be the density of development and the correlated transportation implications. This experience is described below.

Until recently, density on industrial lands was not a Metropolitan issue as it was tied to the nature of the production process. Inner city density controls provided very ample floorspace limits and suburban controls related to set-backs, building height and parking. The need to house the production process in a large space, the availability of vast amounts of vacant suburban industrial land and the manufacturing processes of the post-war period all enabled industries to adopt a single-storey architectural form. However that chapter in industrial development is ending. Industrial construction on the average is becoming higher and at greater densities than was constructed in the post-war suburban industrial lands.

The introduction of office uses has had the greatest impact on the density of suburban industrial areas. While office uses have been locating throughout industrial areas, higher density development has generally been along arterial road frontages. The development of office use per se has been addressed as previously noted. Rather, concern has been expressed with the density of office development.

Since the approval of the Metropolitan Plan in 1980, proposals for office development have been assessed with the intent of limiting the density and controlling the location and extent of office uses. The rationale for this policy has been to maintain the stability of land values in industrial areas, ensuring transportation accessibility and encouraging higher intensity office uses to locate in Centres and in close proximity to public transit. Our review indicates that the proposed density of office uses has generally not been a problem in the interior of industrial areas but rather along arterial road frontages where there has been a demand to develop highrise office buildings. In evaluating office proposals, among other matters, the Department has generally sought to limit the densities to the capacity of the transportation system as other density requirements of the Plan appeared to be satisfied (e.g. that the scale and density of employment support the aim of encouraging the growth of centres).

In dealing with density-transportation relationships, two types of conditions have been placed on development proposals, namely:

i) requiring a reduction in or phasing of floor space so as to result in a manageable number of employees, shoppers and vehicle movements; and/or

ii) requiring improvements to the transportation system, generally at the developer's expense, such as right-of-way and pavement widenings, installation of turning lanes and traffic signals; the restriction of certain vehicular turning movements; and the provision of a limited number of vehicular access points and satisfactory number of parking spaces;

The ability of the Metropolitan Corporation to acquire the arterial road right-of-way width set out in the Official Plan and also rationalize vehicular access

points was achieved previously by mutual agreement. Section 40 of the Planning Act (involving site plan control), which came into use after the adoption of the Plan in 1980, is an improvement to this.

Transportation constraints were found and conditions attached on commercial development in industrial areas, such as "Knob Hill Farms" (on Weston Road), North York Official Plan Amendment D-3-4-32; "West Metro Corporate Centre", West Mall and Dundas Street, Etobicoke Official Plan Amendment C-10-83; and Sufferance/Kennedy Road, Scarborough Zoning By-Law Amendment 20813.

Responding to the Metropolitan comments and the existing Official Plan policy area municipalites are adopting policies limiting densities of offices in industrial areas so as to control the location and limit the extent of office development. North York, which in the past has had a very permissive policy respecting office development and density in industrial areas, has recently adopted more restrictive policies. Official Plan Amendment No. 261 (currently under review) permits offices along arterial road frontages of industrial areas at a maximum density of either 1.0 or 40 000 square feet, whichever is the lesser. A revision to the policy proposes to delete the 40,000 square feet restriction. In addition, the policy designates several of the industrial areas along the Don Valley corridor as Business Parks whose development is limited to a density of 1.5.

East York has adopted a Secondary Plan for the Leaside-Thorncliffe Park Industrial Area. Office development is concentrated in location and limited in density to a maximum of 1.5 scaling downwards. The proposed Draft Official Plan (April 1986) also incorporates density limits on office development.

Scarborough has generally related the development of offices along arterial roads to the adequacy of the road network. In the Progress Industrial District, however, (Official Plan Amendment No. 619) offices are permitted up to a density of 3.0 on lands within 150 metres of a rapid transit station and beyond this distance densities diminish, scaling down to 0.5.

In permitting commercial uses to locate in industrial areas there is a need to decide how to control the density and ensure the ability of the transportation system to accommodate the projected scale of development. From the perspective of transportation considerations, it has been sufficient to relate the scale of development to the adequacy of the transportation system and to require site specific conditions of development to improve transportation matters as noted previously. It is also important to assess the impact of office development in industrial areas on the development of Centres as the latter areas are at the top of the Metropolitan preference as locations for new office development.

3.7 Summary

In the ten years since the current industrial policy was proposed in concept and the seven years of administration of the Official Plan policy, several conclusions result from the consideration by this Department of development proposals. These are listed in summary form.

- The traditional definition of industry being manufacturing, warehousing, processing and transportation and the types of uses permitted in industrial areas are expanding to recognize a much broader range of economic activities which reflect technological advances, the economic role particular to Metropolitan Toronto, and a merging or increased interaction between industrial and commercial functions.

- New non-industrial activities in these areas tend to result in more employment per hectare than is created by traditional industrial functions.

- Non-industrial economic activities and industrial uses tend to be compatible as the character of industrial development takes on more of the appearance of commercial structures and sites.

- Within industrial areas a sorting out of uses has led to a tendency for higher density office and retail uses to locate along arterial roads as opposed to the interior of the areas.

- Area municipalities are undertaking major revisions to their Official Plans which implement the Metropolitan objectives. In doing so they are establishing a structure for industrial areas which provides a more contemporary guide to future industrial area development. This is supportive of the private sector trends in development.

- Metropolitan concerns in addressing site specific applications have tended to be satisfied by the implementation of development conditions related to transportation matters.

From all of the foregoing it may be concluded that while the Plan is generally working the policies for industrial areas could be expanded so as to address the new composite of Metro's industrial development and provide more explicit direction in the structuring of non-industrial uses. Resolution of certain ambiguities could also serve to strengthen the policies.

The primary basis of the foregoing set of conclusions is the generality drawn from the Metropolitan Planning Department's involvement in the planning process. That is mainly the examination of development applications and area municipal proposals for change to zoning by-laws, Official Plans, subdivisions, condominiums and site-plan control agreements and the related co-ordination and development of the Metropolitan position with respect to those matters. This emphasizes the changing nature of development through planning techniques. It does not however provide an understanding of the status of those industrial lands which have both remained constant or have changed <u>within</u> the existing zoning by-laws. The description and analysis of those matters is the subject of the next section of this report. Inter-relating and integration of the findings of each section will provide a basis for the report's conclusions.

4.0 CHARACTER OF INDUSTRIAL AREAS

Industrial areas are located throughout the Metropolitan area, providing Metro Toronto with locations for industrial and other economic activities. **This section presents a profile of designated industrial areas in Metro Toronto as of 1985, outlining the employment and land use character and location of uses in that year only.** It does not undertake an indepth examination of individual industrial areas but rather provides the reader with an analysis of industrial areas from a Metropolitan perspective leading to the examination of current planning policies.

The lands designated industrial in Metro Toronto as of 1985 have been grouped together to form a small manageable number of areas for data analysis. The data is taken from the Planning Department's Employment, Land Use and Assessment Data Bank (E.L.A.). The formulation of 15 industrial groups is based on such characteristics as age (new vs. old), location (inner vs. suburban), and transportation orientation and are without reference to area municipal boundaries. We recognize that there may be different ways of grouping the industrial areas. The following is a list of the fifteen industrial areas which are illustrated on Figure 3.

1. North-West Etobicoke
2. Rexdale
3. Southern Etobicoke
4. Highway 400 Corridor
5. Weston Road/Junction
6. Toronto Central Area/Waterfront
7. Dufferin/Keele North
8. Dufferin/Keele South
9. Don Valley/Highway 404 Corridor
10. Milliken
11. Tapscott/Marshalling Yard
12. Scarborough/401 Corridor
13. West-Central Scarborough
14. South-West Scarborough
15. South-East Scarborough

4.1 Employment

Industrial areas are significant employment concentrations accounting for a total of 414 693 full-time jobs in 1985, of Metro's 1 034 562 full-time jobs. As shown in Table 4, industrial areas account for 40% of Metro's full-time employment including 88% of industrial jobs.

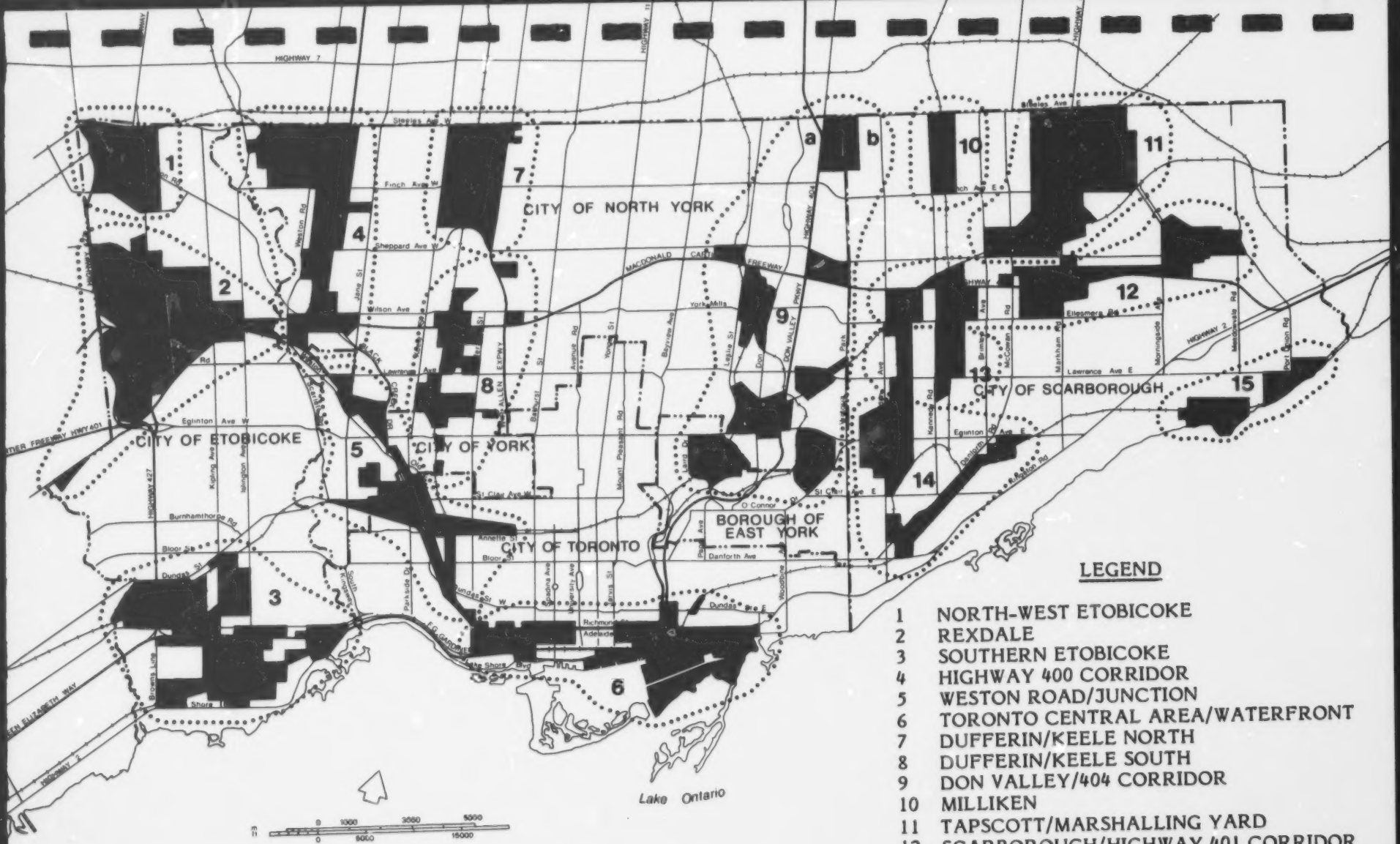
Table 4:

FULL-TIME EMPLOYMENT IN METRO 1985

	Industrial Areas	%	Total Metro	Industrial Areas as % of Total Metro
Industry	231 487	56%	262 848	88%
Office	114 523	28%	465 446	25%
Retail	55 082	13%	180 655	31%
Institutional	9 742	2%	109 167	9%
Recreational	1 520	0%	10 038	15%
Other	2 339	1%	6 408	37%
Total	**414 693**	**100%**	**1 034 562**	**40%**

Source: M.T.P.D.; E.L.A. 1985

Industrial areas are comprised of a mix of employment activities. Industry is the dominant activity group, accounting for just over half of employment in industrial areas. (See Table 4.) Over 75% of the industrial employment is comprised of manufacturing goods processing and product assembly activities. Other employment activities within the industrial sector include warehouse-storage, printing/data processing and terminal/transportation and communications. (See Table 5.)



LEGEND

1 NORTH-WEST ETOBICOKE
2 REXDALE
3 SOUTHERN ETOBICOKE
4 HIGHWAY 400 CORRIDOR
5 WESTON ROAD/JUNCTION
6 TORONTO CENTRAL AREA/WATERFRONT
7 DUFFERIN/KEELE NORTH
8 DUFFERIN/KEELE SOUTH
9 DON VALLEY/404 CORRIDOR
10 MILLIKEN
11 TAPSCOTT/MARSHALLING YARD
12 SCARBOROUGH/HIGHWAY 401 CORRIDOR
13 WEST-CENTRAL SCARBOROUGH
14 SOUTH-WEST SCARBOROUGH
15 SOUTH-EAST SCARBOROUGH

OFFICE PARKS

a. North York has designated this a Business Park
b. Scarborough has designated this a Business District

FIGURE 3 INDUSTRIAL AREAS IN METROPOLITAN TORONTO

Table 5:

COMPOSITION OF FULL TIME INDUSTRIAL EMPLOYMENT IN INDUSTRIAL AREAS 1985

Product assembly	93 110	40.2%
Goods processing	82 965	35.8%
Other manufacturing	16 894	7.3%
Printing/Data Processing	14 317	6.2%
Warehouse	14 062	6.1%
Terminal/Trans./Communications	8 059	3.5%
Storage	2 080	.9%
Total	**231 487**	**100.0%**

Source: M.T.P.D.; E.L.A. 1985 Special Run 3.65

About 28% of employment in industrial areas is composed of office activities, of which over one-third is in industrial related companies (mining, manufacturing, transportation, utilities, construction and resource firms). Trade, personal services, business services, technical services and communications account for a significant proportion of office employment. (See Table 6.)

Table 6:

COMPOSITION OF FULL TIME OFFICE EMPLOYMENT IN INDUSTRIAL AREAS 1985

Industrial related	41 424	36.2%
Trade/Personal Services	21 095	18.4%
Business Services	15 119	13.3%
Technical/Communications	14 113	12.3%
Government	10 438	9.1%
Finance/Insurance/Real Estate	8 269	7.2%
Health/Associations	4 065	3.5%
Total	**114 523**	**100.0%**

Source: M.T.P.D.; E.L.A. 1985 Special Run 3.65

Retail activities comprised of retail shopping, service and accommodation accounts for 13% of employment in industrial areas. Other employment includes institutional and recreational activities.

There are variations in the composition of employment within industrial areas. While industry accounts for just over half of employment in most areas, in Weston Road/Junction, Dufferin/Keele South and West-Central Scarborough industrial areas, industry accounts for at least two-thirds of employment. Industrial activities account for less than half of full-time employment in only three areas, the Toronto Central Area/Waterfront, Don Valley/404 Corridor and Scarborough/401 Corridor. Nearly 40% of employment in these latter areas is comprised of office activities. (See Table 8.)

4.2 Establishments

In 1985 there were almost 20 000 individual firms or establishments in industrial areas. Industrial establishments (dominated by manufacturing goods processing and product assembly) account for 31% of total establishments, retail 30%, and office 36% of the establishments. (See Table 7.) About half of the establishments of office activities are in the business, trade and personal services sectors while only 9% are related to industry.

Firms with less than 10 employees account for about two-thirds of the establishments in industrial areas. However, they account for only 11% of the employment. Large firms with 100 employees or more account for half of the employment in industrial areas but represent only 4% of the total number of establishments. (See Table 9.) Retail establishments are generally small with an average size of ten employees, while office establishments have an average of sixteen employees. Industrial establishments are generally larger with an average of 37 employees per establishment (M.T.P.D., E.L.A. 1985, Special Run 3.16).

Table 7:

TOTAL ESTABLISHMENTS IN INDUSTRIAL AREAS IN METRO TORONTO, 1985

Product assembly	2 267	11.5%
Goods processing	2 056	10.4%
Warehouse storage	756	3.8%
Printing/Repro/Data Processing	649	3.3%
Other manufacturing	270	1.4%
Terminal/Trans/Communication	120	.6%
Total Industry	**6 118**	**31.1%**
Retail service	3 098	15.7%
Retail shopping	2 869	14.6%
Accommodation	23	.1%
Total Retail	**5 990**	**30.4%**
Business services	1 999	10.2%
Industry related Office	1 797	9.1%
Trade/Personal services	1 378	7.0%
Technical/Communication	794	4.0%
Health/Associations	542	2.8%
Finance/Insurance/Real Estate	487	2.5%
Government	119	.6%
Total Office	**7 116**	**36.2%**
Institutions	**220**	**1.1%**
Recreation	**125**	**.6%**
Other	**109**	**.6%**
Total Establishments	**19 678**	**100.0%**

Source: M.T.P.D.; E.L.A. 1985 Special Run 3.65
Based on Full-time Employment Activities

Table 8:

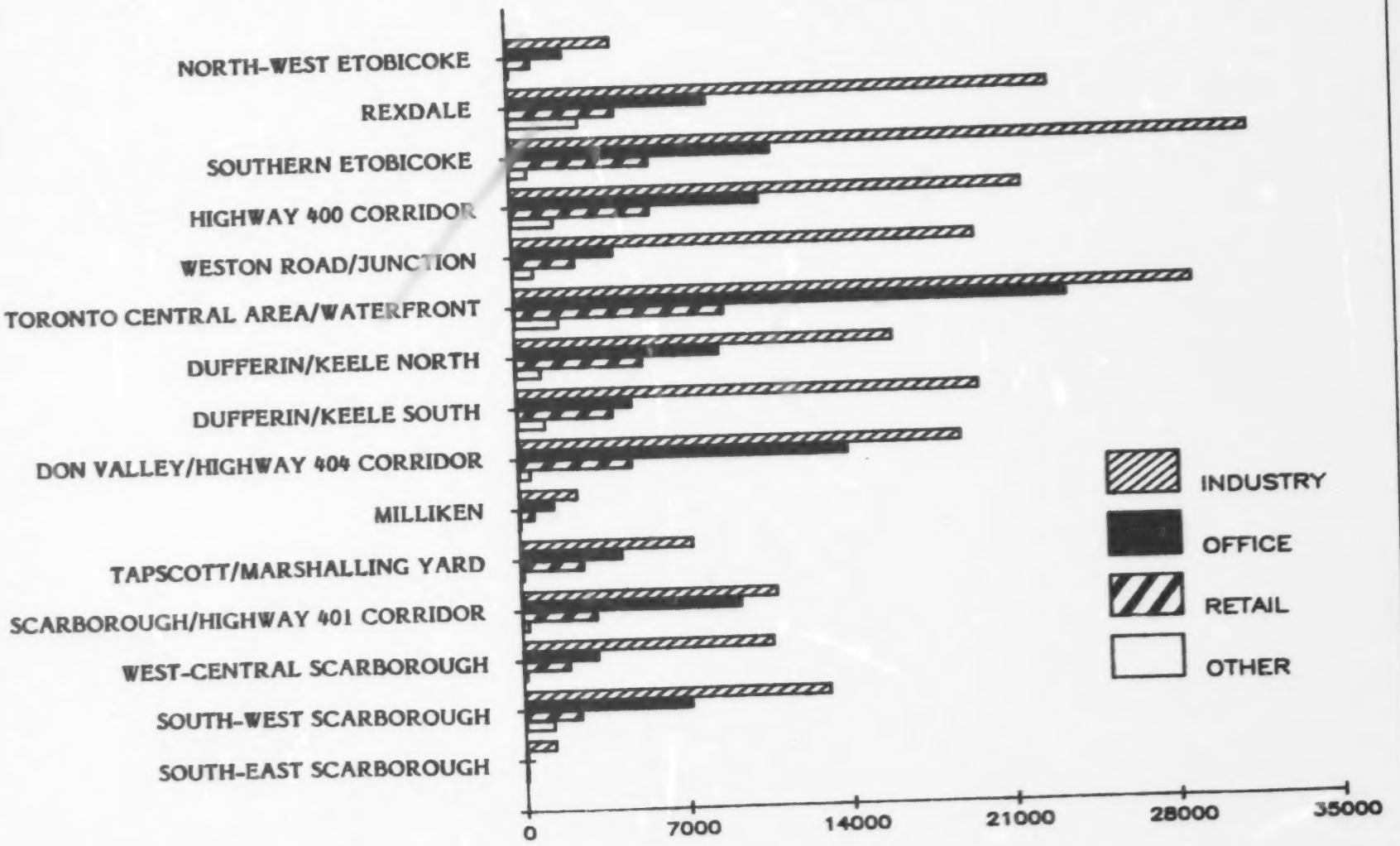
FULL-TIME EMPLOYMENT IN INDUSTRIAL AREAS IN METROPOLITAN TORONTO 1985

	Industry		Office		Retail		Institution		Recreation		Other		Total	
North-West Etobicoke	4 536	54.8%	2 466	29.8%	1 099	13.3%	23	.3%	20	.3%	131	1.6%	8 279	100%
Rexdale	23 206	58.8	8 561	21.7	4 638	11.7	1 797	4.6	768	1.9	504	1.3	39 474	100
Southern Etobicoke	31 713	63.7	11 247	22.6	5 999	12.1	556	1.1	17	.0	233	.5	49 767	100
Highway 400 Corridor	21 928	54.2	10 676	26.4	5 981	14.8	1 590	3.9	91	.2	166	.4	40 432	100
Weston Road/Junction	19 845	71.3	4 351	15.6	2 715	9.7	361	1.3	19	.1	561	2.0	27 852	100
Toronto Central Area/Waterfront	29 132	45.6	23 726	37.2	9 012	14.1	1 430	2.2	219	.3	306	.5	63 820	100
Dufferin/Keele North	16 202	51.4	8 749	27.7	5 477	17.4	976	3.1	107	.3	36	.1	31 547	100
Dufferin/Keele South	19 855	65.9	4 941	16.4	4 123	13.7	988	3.3	133	.4	109	.4	30 149	100
Don Valley/404 Corridor	19 016	49.3	14 123	36.6	4 900	12.7	414	1.1	31	.1	96	.2	38 580	100
Milliken	2 492	53.5	1 496	32.1	664	14.3	3	.1	0	.0	1	.0	4 656	100
Tapscott/Marshalling Yard	7 413	50.5	4 378	29.8	2 730	18.6	41	.3	21	.1	108	.7	14 691	100
Scarborough/401 Corridor	10 975	45.9	9 394	39.3	3 228	13.5	219	.9	46	.2	37	.2	23 899	100
West-Central Scarborough	10 749	66.6	3 218	19.9	2 005	12.4	117	.7	33	.2	20	.1	16 142	100
South-West Scarborough	13 107	54.6	7 165	29.9	2 452	10.2	1 227	5.1	12	.1	25	.1	23 988	100
South-East Scarborough	1 316	92.9	32	2.3	59	4.2	0	.0	4	.3	6	.4	1 417	100
Total Industrial Areas	231 487	55.8%	114 523	27.6%	55 082	13.3%	9 782	2.3%	1 520	.4%	2 339	.6%	414 693	100%

Source: M.T.P.D.; E.L.A. 1985 Special Run 3.65

FIGURE 4

FULL-TIME EMPLOYMENT IN INDUSTRIAL AREAS METROPOLITAN TORONTO, 1985



Source: M.T.P.D.; E.L.A. 1985

Table 9:

SIZE OF FIRMS IN INDUSTRIAL AREAS BY NUMBER OF FULL-TIME EMPLOYEES

Size of Firm	No. of Firms	No. of Employees	% of Firms	% of Employees
1-2	5 481	8 434	27.9%	2.0%
3-9	7 520	37 489	38.2%	9.0%
10-49	4 895	100 383	24.9%	24.2%
50-99	938	61 719	4.8%	14.9%
100-199	513	67 872	2.6%	16.4%
200-499	252	71 003	1.3%	17.1%
500+	79	67 793	0.4%	16.3%
Total	**19 678**	**414 693**	**100.0%**	**100.0%**

Source: M.T.P.D.; E.L.A. 1985 Special Run 3.16

4.3 Land Use and Floor Space in Industrial Areas

Land use data is based on every property being given a parcel code which identifies the perceived predominant land use on the parcel. Where a parcel is comprised of more than one unit, all the data is assigned to the perceived dominant use. While recognizing that 1985 was the first year the Planning Department used the parcel code, the quality of the data should improve over time.

There are approximately 9 232 hectares of designated industrial land in Metropolitan Toronto, most of which is developed. About 1 249 hectares, or 14%, is vacant. This does not include the unused portions of properties which provide considerable expansion potential. In half of the industrial areas, less than 7% of the lands are vacant. The Tapscott-Marshalling Yard area with 598 hectares of vacant industrial land and to a lesser extent three other areas (Scarborough/401 Corridor, Rexdale and North-West Etobicoke) are the only

Table 10:

COMPOSITION OF LAND USE AND FLOOR SPACE IN INDUSTRIAL AREAS

	Land Use		Gross Floor Area	
	Hectares	%	Square Metres	%
Industry				
General Manufacturing	2 437	32%	9 534 758	39%
Warehouse	821	11	2 880 093	12
Transportation and Communications	663	9	917 774	4
Mixed Industrial/Commercial	586	8	2 322 948	10
Sewer, Water, Refuse, Maintenance	327	4	176 161	1
Open Storage	188	3	93 130	0
Storage Tanks/Silos	168	2	149 128	1
Heavy Industry	133	1	327 851	1
Research and Development	20	0	40 098	0
Industry (total of above)	5343	70%	16 441 941	68%
Office	909	12	3 616 622	15
Retail	827	11	2 940 176	12
Institution	222	3	463 044	2
Recreation	216	3	125 532	1
Accommodation	28	0	212 605	1
Other	88	1	331 083	1
Total of Developed Land	**7 633**	**100%**	**24 131 003**	**100%**
Developed Land	7 633	82		
Vacant Land	1 249	14		
Open Space	350	4		
Total of All Land	**9 232**	**100%**		

Source: M.T.P.D.; E.L.A. 1985 Special Run 3.64

areas with large inventories of vacant industrial land in Metro. It is reported that 29% of the vacant lands in Tapscott are on sites greater than 30 hectares and a further 30% are on parcels between 10 and 30 hectares in size. (City of Scarborough Economic Development Department, 1986, p. 237.) However, only about 25% of this vacant land is serviced. (Ibid p. 140)

Most of the land in industrial areas is occupied by industrial uses. Industrial uses account for 70% of the developed land (excluding vacant land and open space) and 68% of the gross floor area in industrial areas. The industrial sector is composed of several sub-categories, as indicated on Table 10, of which general manufacturing involving the assembly and production of goods predominates. The remaining industrial land use and floor space includes warehousing, mixed industrial-commercial malls and transportation and communications uses. There is little heavy industry (production processing uses considered to be noxious) in Metro Toronto. Table 10 indicates that the office category accounts for 12% of the land uses and 15% of floor space and the retail category 11% and 12% respectively in industrial areas.

While industry is the predominant land use in most industrial areas, in the Don Valley/404 Corridor and Toronto Central Area/Waterfront, office uses account for nearly 30% of the gross floor area. (See Tables 11 and 12.)

4.4 Correlating Employment and Land Use

A review of the character of industrial areas indicates that while industry is the dominant use, a range of non-industrial uses are located in industrial areas. This pattern of development appears to reflect the growth in the service sector and the lack of adequate commercial areas. Although non-industrial activities such as business services and retail uses provide a service to all sectors of the economy, they are also important to industrial operations and contribute to overall economic viability. The location of day care facilities, recreation facilities, banks and restaurants in industrial areas is also meeting the demands exerted from the work force in industrial areas.

Table 11:

COMPOSITION OF DEVELOPED LAND IN INDUSTRIAL AREAS IN METROPOLITAN TORONTO

	Industry	Office	Retail	Institution	Recreation	Other	Total
North-West Etobicoke	74.1%	18.2%	6.6%	.1%	.9%	.0%	100.0%
Rexdale	67.1	15.4	9.1	5.2	1.5	1.7	100.0
Southern Etobicoke	75.4	9.6	11.1	2.5	.4	1.0	100.0
Highway 400 Corridor	62.6	8.7	11.8	5.8	9.1	1.9	100.0
Weston Road/Junction	75.6	3.4	15.7	3.4	1.6	.4	100.0
Toronto Central Area/Waterfront	72.8	12.6	10.9	1.5	1.2	.9	100.0
Dufferin/Keele North	80.4	5.2	10.4	2.8	1.2	.0	100.0
Dufferin/Keele South	71.1	5.2	17.5	4.1	.7	1.3	100.0
Don Valley/404 Corridor	56.3	30.0	9.5	1.8	.3	2.1	100.0
Milliken	63.1	19.9	15.5	.2	.0	1.3	100.0
Tapscott/Marshalling Yard	64.1	6.8	10.1	.4	13.9	4.7	100.0
Scarborough/401 Corridor	77.0	12.7	5.9	1.7	1.2	1.6	100.0
West-Central Scarborough	82.9	4.6	10.5	.3	1.0	.7	100.0
South-West Scarborough	63.6	8.6	18.9	5.5	.5	2.9	100.0
South-East Scarborough	72.7	27.0	.0	.0	.0	.0	100.0
Total Industrial Areas	**70.0%**	**11.9%**	**10.8%**	**2.9%**	**2.8%**	**1.6%**	**100.0%**

Source: M.T.P.D.; E.L.A. 1985, Special Run 3.64

Table 12:

COMPOSITION OF GROSS FLOOR AREA IN INDUSTRIAL AREAS

	Industry	Office	Retail	Institution	Recreation	Other	Total
North-West Etobicoke	81.0%	12.4%	6.4%	.1%	.0%	.1%	100.0%
Rexdale	70.0	22.0	5.3	.7	.1	1.9	100.0
Southern Etobicoke	77.4	10.2	9.8	1.3	.3	.9	100.0
Highway 400 Corridor	70.3	10.7	13.5	4.0	.7	1.0	100.0
Weston Road/Junction	72.0	9.3	14.5	2.1	.4	1.7	100.0
Toronto Central Area/Waterfront	47.0	26.8	18.4	2.6	.5	4.6	100.0
Dufferin/Keele North	77.1	5.9	13.3	1.3	2.0	.4	100.0
Dufferin/Keele South	71.1	5.3	17.4	3.2	.8	2.4	100.0
Don Valley/404 Corridor	57.3	28.7	6.9	1.6	.4	5.3	100.0
Milliken	78.8	8.8	8.6	.2	.0	3.6	100.0
Tapscott/Marshalling Yard	77.1	11.7	7.9	.1	.5	2.8	100.0
Scarborough/401 Corridor	78.3	12.3	5.2	.9	.4	3.0	100.0
West-Central Scarborough	86.1	3.0	10.1	.1	.7	.1	100.0
South-West Scarborough	70.6	7.8	17.5	3.1	.3	.7	100.0
South-East Scarborough	76.9	20.6	.2	.0	.0	2.3	100.0
Total Industrial Areas	**68.0%**	**15.0%**	**12.0%**	**2.0%**	**1.0%**	**2.0%**	**100.0%**

Source: M.T.P.D.; E.L.A. 1985, Special Run 3.64

The profile of Metro's industrial areas indicates diverging characteristics in employment and land use. While industry is the dominant sector of land use in industrial areas, it accounts for a significantly smaller share of employment. Industrial uses generally occupy larger sites and greater amounts of floor space than other types of activities. Non-industrial uses on the other hand are generally not as land extensive as industry, but account for a high proportion of employment. Office activities, for example, account for only 12% of land use in industrial areas but 28% of employment.

Activities which are major land users (such as industry) are not as intensive generators of employment. The economy of industrial areas has evolved to a mix of employment with a significant office element but with the majority of land being occupied by industry. Automation of manufacturing operations, general economic changes and growth of office activities are likely to continue this trend. This has implications for the continued mixing of uses in industrial areas and will be discussed in Section 5. But it should be noted that it may not be appropriate to relate employment trends to the land needs of industry. Declining industrial employment does not necessarily mean a declining industrial sector. This is partly the result of automation and frequently reflects a more competitive industrial sector.

4.5 Distribution of Development

This section describes the distribution of development in industrial areas across Metro. Data for this section is found in tables A8 and A9 in the Appendix.

Industry

Although industry is located throughout Metro's industrial areas, some areas have a high concentration of industrial activities. About two-thirds of the industrial employment and 60% of industriall floor space is concentrated in the industrial areas west of Keele Street and in the Toronto Central Area/Waterfront. Only a small proportion of Metro's industrial employment and floor space is located in some of the newer, not yet fully developed areas, such as North-West Etobicoke, Milliken and Tapscott/Marshalling Yard.

Distribution of development of the industrial sub-categories is discussed below.

- Half of the employment in **goods processing** activities is concentrated in the industrial areas west of Keele Street. Southern Etobicoke, for example, has has a high level of food related and processing activities, chemical product industries and electrical and electrical equipment manufacturing. The Highway 400 Corridor has a significant level of machinery, metal fabricating, furniture and electronics industries.

- Employment in **product assembly** activities is fairly evenly distributed across Metro with the exception of some of the newer industrial areas and South-East Scarborough which have less. Product assembly activities in Rexdale include electrical, mechanical, vehicular and equipment product and machinery industries.

- Over 60% of the **warehouse** space is concentrated west of Jane Street and in Dufferin/Keele South. Rexdale and Southern Etobicoke also account for 40% of the employment in warehouse activities in Metro's industrial areas. Many warehousing industries are located in Rexdale to be near Pearson Airport and the provincial highway system.

- About two-thirds of the **"mixed industrial-commercial malls"** are located in the northern industrial areas of North-West Etobicoke, Highway 400 Corridor, Dufferin/Keele North, Tapscott/Marshalling Yard and the Scarborough/401 Corridor. These are generally the newer industrial areas in Metro. Development in Dufferin/Keele North, for example, is characterized by a significant amount of multi-unit industrial buildings accommodating industrial, office and retail uses, including banquet halls and retail sales.

- Nearly three-quarters of the **transportation and communications** floor space is located in Southern Etobicoke, Toronto Central Area/Waterfront and Weston Road/Junction. This industrial sector is characterized by truck depots, bus terminals, distribution centres, and port facilities. Over half of the employment in this category is concentrated in Dufferin/Keele South and Southern Etobicoke. While many trucking industries and container

Rail yards - a transportation land use in Southern Etobicoke.

Truck transportation is a major element of most industrial plants.

DATA PROCESSING CENTRES IN INDUSTRIAL AREAS

A computer age factory for the processing of data in a clean office environment

Victoria Park and Steeles area

Scarborough/Highway 401 corridor

depots are located in these areas, there is concern that due to congestion of the road network these uses may relocate in the surrounding regions where greater transportation accessibility is available.

- About one-third of employment and 27% of establishments in **printing, reproduction and data processing** are concentrated in the Don Valley/404 Corridor and the Toronto Central Area/Waterfront. These uses are associated with office activities and often seen as office functions: e.g., data centres. Printing and publishing activities have a long history in parts of the Toronto Central Area/Waterfront industrial area. Recent examples in the King-Spadina area include the Globe and Mail newspaper and the Royal Bank data centre. The area also has a high concentration of the growing film and video industry in Metro.

Office

The Toronto Central Area/Waterfront accounts for over 20% of the office employment and establishments and one-third of the office floor space in Metro's industrial areas. The high concentration of office activities in this industrial area is related to the office development of the Central Area. The industrial areas adjacent to Metropolitan Office Parks also have a high concentration of office floor space (Rexdale and Don Valley/404 Corridor have 14% each). The industrial areas in the Don Valley/404 Corridor and Toronto Central Area/Waterfront have a high concentration of employment in business services (including lawyers, accountants, management consultants and computer services), technical and communications activities (such as architects, planners, engineers and other services) and employment in finance, insurance and real estate. Nearly 50% of the establishments in business services, trade and personal services are located in the Toronto Central Area/Waterfront industrial area.

A significant amount of employment in the finance, insurance and real estate sector is also found in South-West Scarborough. The Bank of Nova Scotia data centre is located in this area. A high concentration of employment in technical and communications activities is also located in the Scarborough/401 Corridor, with much of it accounted for by the CFTO TV facility. Employment in trade

and personal services is generally distributed throughout most of Metro's industrial areas.

Retail-Service Uses

A range of retail-service uses has developed in most industrial areas. A review of present trends indicates that they include the following uses:

- retail-warehouses: retail stores selling furniture, broadloom and other home improvement products which require a large amount of storage space and display area for merchandise;
- large single stores such as food outlets and garden centres;
- automotive uses involving the sale, service and repair of motor vehicles;
- other uses serving the industrial area and surrounding community.

Some of these uses such as retail-warehouses and "super-stores" require fairly large parcels of less costly land not available in existing commercial areas. Not being able to compete in established retail centres, these uses have sought to locate on the fringes of industrial areas which offer good visibility, cheaper land costs and rents, large sites and transportation accessibility. Other uses such as banks, restaurants, day nurseries, hotels and commercial-recreational uses have located in industrial areas to provide a service to the industries and employees in the area as well as the surrounding community.

About 20% of retail employment and retail establishments and 27% of retail floor space in industrial areas are concentrated in the Toronto Central Area/Waterfront indicating the high level of retailing undertaken in this area. Accommodation uses are concentrated in Rexdale, the Don Valley/404 Corridor, the Scarborough/401 Corridor and the Toronto Central Area/Waterfront. These industrial areas are associated with Metropolitan Centres and Office Parks.

4.6 Industrial Lands Adjacent to Office Parks

Office Parks have an influence on the character of adjacent industrial areas. While most of the industrial lands next to Office Parks are still mainly composed of industrial development, some areas are dominated by office activities and have taken on an office character.

RETAIL ACTIVITIES IN INDUSTRIAL AREAS

Home improvement centres located on an arterial road with high visibility and ample parking.

Retail plaza providing services for the general public easily accessible from the arterial road.

A food superstore not easily accommodated in existing commercial areas.

- The industrial lands south of the Airport Strip Office Park are developed with several office buildings and multiple unit buildings for business services. The area is taking on a prestige hi-tech office character.
- The industrial lands adjacent to the Parkway-Finch Office Park are dominated by office uses, computer-related high technology firms and business services. North York has designated the area up to Steeles Avenue as part of the Parkway-Finch Business Park (Amendment No. 261). Scarborough has designated the industrial lands east of Victoria Park Avenue as a Business District.
- Industrial lands adjacent to the Duncan Mill Office Park are developed with a mix of industrial, office and commercial uses. Some lands contain large office buildings and have the appearance of being part of the Office Park.
- A range of uses are located on the industrial lands adjacent to the Flemingdon Park Office Park. They include industry, retail-commercial uses, business services, a hotel complex and office buildings.

As indicated in this discussion, some industrial lands adjacent to Office Parks are no longer industrial in character and continued growth of some of the Office Parks will likely continue to spill over into these adjacent industrial lands.

4.7 Toronto Central Area/Waterfront Industrial District

The Toronto Central Area/Waterfront is a diverse industrial district comprised of 761 hectares of land. It is composed of several industrial areas located on either side of the downtown core including the port area. The district includes several major residential neighbourhoods and areas of commercial uses. Expansion of the office sector in the downtown and the movement of traditional industrial firms out of the district have led to this very mixed character.

The district had 63,820 full-time jobs in 1985 of which 28,272 jobs were in manufacturing and warehousing. The office and retail sectors account for half of the employment and three-quarters of the establishments in this industrial area. Nearly two-thirds of the office employment in this area is in business services, technical-communications and government with industrial related office jobs accounting for only 16% of office employment.

Many areas in the Toronto Central Area/Waterfront industrial district are undergoing a transition. The potential extent of the transition is great as changes in the general economy have implications for the future of industry in this area. The consolidation of industry will likely continue creating some areas of specialization such as the fashion district. But as traditional industrial uses continue to move out, there is a need to assess the future of these industrial buildings and lands.

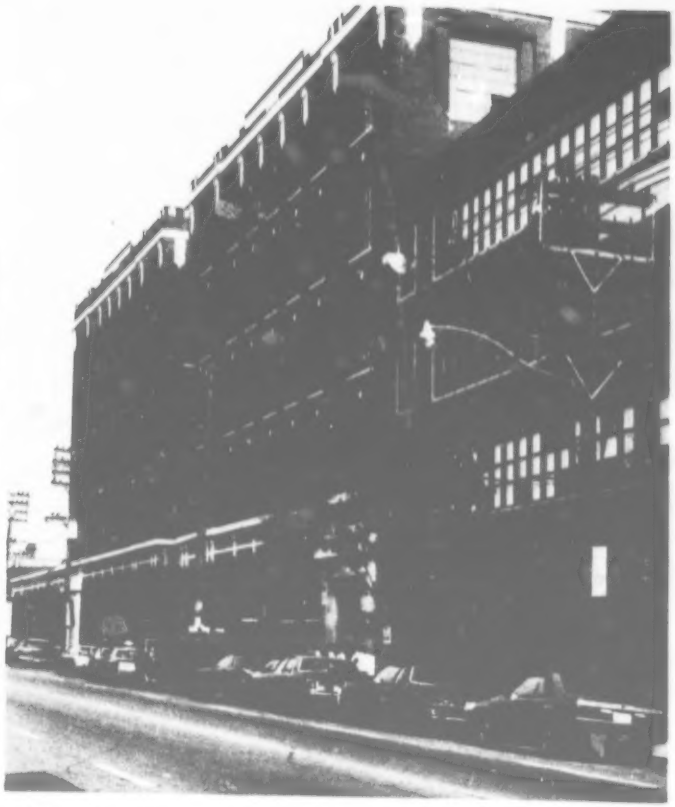
Many sites are no longer viable for continued traditional industrial use. Much of the industrial building stock in this area is old, dating back to the early 1900's and late 1800's. Large multi-storey industrial buildings, once housing manufacturing uses, are being subdivided for a variety of smaller service sector firms and new industrial uses. The attraction of new industrial uses involving high technology industries, computer uses and research and development firms could help ensure a continued role for industry in this area.

From a Metropolitan perspective, in planning for these lands it is important to recognize that they are part of the Central Area where competing Metropolitan interests exist. Redevelopment or re-use of much of these lands is likely over time. Conversion of some large industrial buildings for housing and development of some industrial lands for residential use may be appropriate to achieve Metropolitan population and housing objectives. Consideration should also be given to developing the recreational potential of industrial lands along the waterfront in support of the expanding tourist and convention industry which has become a very important sector of the Metropolitan economy.

The decline of some areas may require a planning response unique to each area, as was the case for the Massey Ferguson lands. However, this is primarily a local planning matter in which Metropolitan Toronto may provide technical and financial assistance to the planning exercises in order to assist in the attainment of Metro's broader objectives. The City of Toronto has adopted a strategy to attract new industrial uses and other employment activities in order to revitalize the physical and economic structure of this area. Redevelopment of industrial lands to higher employment uses should relate to the Metropolitan concern of accommodation of traffic and transportation accessibility.

The Port industrial area has undergone a decline in port activities.

Rehabilitation of an old industrial building for broadcasting uses.



Old multi-storey industrial buildings in the Toronto Central Area/Waterfront.

The Port Area

The Port Area is a major industrial area in Metropolitan Toronto comprised of about 350 hectares of land. It has an employment base of approximately 3,000 full-time jobs (in 1985). The Port industrial area is the only location in Metro where port activities take place. It has historically been dominated by shipping and heavy industrial uses including oil tank farms, public utilities, outside storage and recycling industries. Activities also include recreational amenities.

Port activities have extensive linkages with other industrial and business sectors in Metro. The marine terminals serve as a gateway for cargo to the larger region. Products such as cement, salt and fuels are also distributed from the port to areas throughout the region.

But the Port Area is undergoing a transition due to the decline in port activities. Total cargo tonnage through the Port has fallen to about half the 1960's levels. In 1985 only 530 cargo vessels came to call at Toronto as compared to 3 962 in 1965. The result has been a reduction in land used for shipping purposes.

Due to the unique function of the Port serving shipping needs of the region, the Port's potential for further employment generation, the implications for infrastructure and water related activities, Metropolitan Toronto has an interest in the future of this area. The land south of the Ship Channel is unserviced and much of the land in the district is significantly underutilized. Redevelopment of the Port Area is of Metropolitan interest and should give recognition to the area's proximity to the downtown as well as its physical and perceived isolation from the rest of the city. Public transit and transportation accessibility to large parts of the area is poor and would be an important factor in any redevelopment scheme.

An opportunity exists to redevelop much of the underutilized and vacant lands and introduce high employment generating industries to the area. Other employment activities which support the industrial base of the area may also be considered. It may also be appropriate to develop part of the area for recreational activities in support of Metropolitan tourism objectives. But it is in the Metropolitan interest to support the unique industrial function of the port area and to maintain sufficient lands to meet the needs of port uses. Due to the

uncertain future of the area, studies should be undertaken to define the Metropolitan interests in the Port area.

4.8 Structure of Development in Industrial Areas

This report has indicated that industrial areas are quite mixed. Over 66% of the office and retail employment in industrial areas is located on lands in the interior of industrial areas. However, it appears that a distinct urban structure is emerging in the mixing of activities in industrial areas. There appears to exist a mixed pattern of development along arterial road frontages, while industrial uses generally predominate in the interior of industrial areas.

Table 13 indicates that 53% of employment along Metropolitan arterial road frontages is comprised of office, retail and other non-industrial activities, as compared to only 41% of the employment along non-arterial roads.

Table 13:

COMPOSITION OF FULL-TIME EMPLOYMENT ALONG METROPOLITAN ARTERIAL ROADS AND NON-ARTERIAL ROADS IN INDUSTRIAL AREAS

	Metropolitan Arterial Roads	Non-Arterial Roads
Industry	47%	59%
Office	31%	27%
Retail	17%	12%
Institutional	4%	2%
Recreation	1%	0%
Total	**100%**	**100%**

Source: M.T.P.D.; E.L.A. Special Run 3.65, 1985

The structure of development in Metro's industrial areas generally falls into one of the following:

(1) lands where the predominant activity is industrial;

(2) lands along arterial road frontages where there is a mix of industrial and commercial activities;

(3) lands where there is a mix of activities but dominated by commercial activities.

In most of the industrial areas there is a mix of activities along arterial roads with non-industrial activities generally predominating. But not all the industrial areas follow this structure. For instance, in some industrial areas which have a mainly industrial character (such as Southern Etobicoke, Weston Road/Junction and Dufferin/Keele South) arterial roads are used primarily for industrial activities.

The industrial lands in the Toronto Central Area/Waterfront are a special case. In this area there is no differentiation in the structure of development along arterial and non-arterial roads. This industrial area exhibits a very mixed character throughout.

In addition, some of the industrial lands along non-arterial roads in the Don Valley/404 Corridor and Scarborough/401 Corridor exhibit a very mixed pattern of development in which industrial uses do not predominate. It appears that development of the Office Parks and Centre in these areas is extending into the adjacent industrial lands. Development of the Scarborough City Centre may place pressures on the adjacent industrial lands for increased commercial development. As the Office Parks become fully developed, the adjacent industrial lands are likely to experience continued pressures for office activities.

4.9 Office Space and Office Buildings

This Department's Office Data Bank identifies 316 buildings in designated industrial areas (see Table 14), however, not all of them are stand-alone office buildings. Most manufacturing activities, for example, have an office component ancillary to their industrial operation. In many cases, the amount of space the office component occupies in the industrial operation is quite significant. With an increasing level of employment and floor space in industrial operations being used for office functions reflecting the growth of information intensive activities, the proportion of office space in an industrial building is likely to increase.

Table 14:

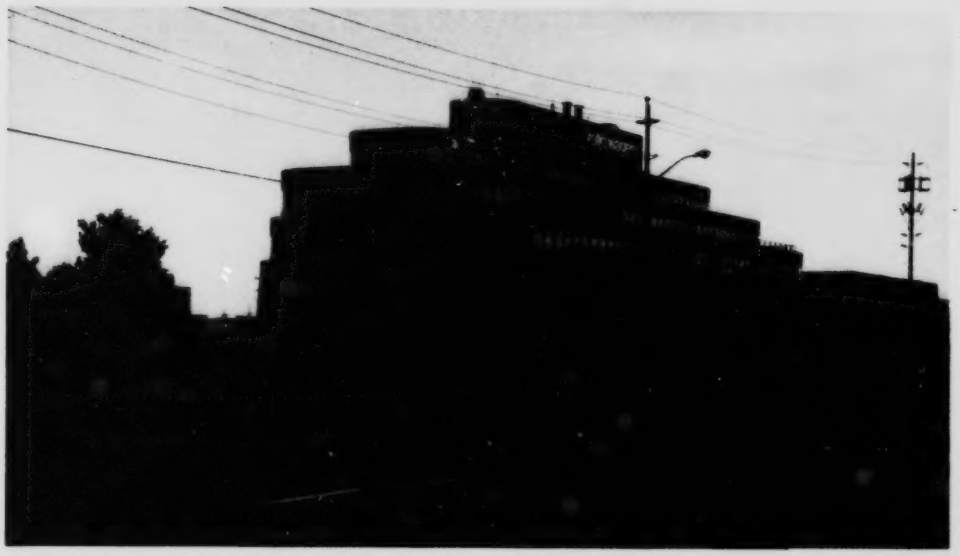
OFFICE SPACE AND OFFICE BUILDINGS IN INDUSTRIAL AREAS IN METROPOLITAN TORONTO 1986

Industrial Concentration	No. of Buildings	Site Area (hectares)	G.F.A. (sq. metres)	Office F.A. (sq. metres)	as % of G.F.A.	Office Employment	As % of Total Employment	Other Employment	As % of Total Employment	Total Employment
North-West Etobicoke	7	6.97	21 297	17 659	83%	1 185	96%	55	4%	1 240
Rexdale	28	31.36	194 598	137 607	71%	4 730	89%	599	11%	5 329
Southern Etobicoke	24	44.40	157 449	97 652	62%	3 587	80%	902	20%	4 489
Highway 400 Corridor	23	48.85	210 974	107 606	51%	3 722	82%	815	18%	4 537
Weston Road/Junction	15	15.70	313 356	77 037	25%	3 974	54%	3 349	46%	7 323
Toronto Central Area/Waterfront	77	51.52	725 289	196 355	27%	8 381	58%	6 165	42%	14 546
Dufferin/Keele North	9	20.06	82 291	45 495	55%	2 052	85%	354	15%	2 406
Dufferin/Keele South	20	20.75	90 596	46 661	52%	2 133	96%	98	4%	2 231
Don Valley/404 Corridor	47	105.77	328 397	255 942	78%	7 789	89%	969	11%	8 758
Milliken	4	10.01	36 109	14 929	41%	618	57%	476	43%	1 094
Tapscott/Marshalling Yard	13	44.69	98 974	79 959	81%	1 343	63%	804	37%	2 147
Scarborough/401 Corridor	30	89.13	198 536	156 837	79%	6 189	83%	1 308	17%	7 497
West-Central Scarborough	9	19.63	34 073	25 112	74%	681	81%	158	19%	839
South-West Scarborough	10	38.50	138 219	124 138	90%	4 207	97%	132	3%	4 339
Total	**316**	**547.32**	**2 630 158**	**1 382 989**	**53%**	**50 591**	**76%**	**16 184**	**24%**	**66 775**

Source: M.T.P.D.; Office Data Bank 1986

Industrial building with an office component.

Industrial-Commercial complex on arterial road with surface transit.



Free-standing office building along an arterial road.

Office space is also found in industrial-commercial malls. These multi-unit buildings often contain office activities together with industrial and other uses. Continued growth of service sector activities is likely to result in growth of multi-unit industrial-commercial buildings to acommodate these uses.

Of the 316 buildings, only 207 can be considered as being truly office buildings (where office floor space accounts for at least 75% of the gross floor area of the building). The average size of office buildings is fairly small (4 376 square metres). Only 24 buildings have a floor space greater than 10,000 square metres.

These large office buildings account for 35% of the office floor space and 25% of the office employment of the 316 office buildings in industrial areas. The data indicates that **most of the office buildings in industrial areas are of a fairly small nature and are much smaller than office buildings in Metropolitan Centres.**

Of the 207 office buildings in industrial areas, about 60% are located along arterial roads. About 70% of the floor space and office employment of these buildings and most of the 24 large office buildings (which have more than 10 000 square metres of office space) are located along arterial roads.

4.10 Density of Development

The scale or density of development in Metro industrial areas (based on a floor space index ratio, F.S.I.) is fairly low (0.3 F.S.I.). The proliferation of office development has for the most part not affected the density of development in most areas. Office buildings located in industrial areas are generally of a low scale with an F.S.I. of .34. There is little or no difference in the density of development along arterial road frontages from the interior of industrial areas.

In the Weston Road/Junction and Toronto Central Area/ Waterfront, however, the density of development is higher at 0.6 F.S.I. and the density of office buildings is much higher at 2.6 F.S.I. and 1.3 F.S.I. respectively. These are generally much older industrial areas with more intensive use of land. It is not uncommon to find multi-storey industrial buildings at densities of 7.0 F.S.I. in some of these industrial lands. In the new suburban industrial areas, the scale of

development is much lower with single storey industrial buildings sitting on large lots. This form of development is also characteristic of office buildings in suburban industrial areas.

4.11 Employment Density

The average employment density (number of people employed on a piece of land) in industrial areas is 53 employees per hectare of developed land. (See Table 15.) The employment density along arterial roads is likely to be higher where the character of development is more mixed and of higher intensity. Some older industrial areas such as Weston Road/Junction and Toronto Central Area/Waterfront have a very high employment density, indicating a more labour intensive use of land. The newer industrial areas of North-West Etobicoke and Tapscott/Marshalling Yard have a much lower employment density of 29 and 27 respectively, probably due to the nature of industry located there, the types of structures, large sites and parking areas.

Table 15:

EMPLOYMENT DENSITY IN INDUSTRIAL AREAS

	Average No. of Employees/hectare of occupied land*
North-West Etobicoke	29.1
Rexdale	44.4
Southern Etobicoke	50.2
Highway 400 Corridor	43.8
Weston Road/Junction	83.0
Toronto Central Area/Waterfront	96.2
Dufferin/Keele North	59.0
Dufferin/Keele South	78.8
Don Valley/404 Corridor	66.2
Milliken	44.7
Tapscott/Marshalling Yard	26.6
Scarborough/401 Corridor	47.6
West-Central Scarborough	59.5
South-West Scarborough	60.2
South-East Scarborough	6.5
Total Industrial Areas	**53.3**

* excluding vacant land and open space

Source: M.T.P.D.; E.L.A. 1985 Special Runs 3.65, 3.64

Employment density is the result of such factors as the type of use on the land and the allowable coverage. The employment density for office uses is much higher than that of industry. Due to the adoption of new manufacturing technologies resulting in a decline in jobs and an increase in space requirements, the trend appears to be for the traditional industrial employment density to decline, indicating that in the future, more land will be required to accommodate a given amount of industrial employment. Office use on the other hand is a much more labour intensive use of land. The implication is that if we were to maintain our existing industrial employment base, then there is a need to maintain industrial lands for industry.

4.12 Summary

Manufacturing is the single most important sector of industrial areas, providing Metro with a significant source of both assessment and employment. A review of data for 1985 indicates that the economy of industrial areas is dominated by industrial land use and floor space (of mainly manufacturing and warehousing uses) with a mix of employment including office and retail activities. Industrial uses appear to be occupying the bulk of land and floor space while non-industrial uses are generally not as land extensive but account for a high proportion of employment. With most industrial areas containing little vacant land, an increasing proportion of development in these areas will likely be in the form of intensification, re-use and redevelopment.

The profile of industrial areas reveals that industrial areas in Metro are not homogeneous. Some areas such as Southern Etobicoke, Weston Road/Junction, Dufferin/Keele South and West-Central Scarborough, have a mainly industrial character. Several industrial areas including North-West Etobicoke, Highway 400 Corridor, Dufferin/Keele North, Milliken, South-West Scarborough, Tapscott/Marshalling Yard and Scarborough/401 Corridor are dominated by industrial land use and floor space, but contain a mix of employment. In the Don Valley/404 Corridor and Toronto Central Area/Waterfront industrial areas there is a mix of land use, floor space and employment activities with a significant office sector. Some industrial lands adjacent to Office Parks are dominated by office activities and have taken on an office character.

There is a pattern as to the distribution of uses in Metro Toronto. A high concentration of industrial employment and uses is located in the industrial areas west of Keele Street and in the Toronto Central Area/Waterfront. Most of the mixed industrial-commercial activities are generally located in the newer industrial areas north of Highway 401. A significant proportion of office activities are concentrated in the industrial areas adjacent to Office Parks in the Don Valley/404 Corridor and in the Toronto Central Area/Waterfront.

A distinct urban structure is emerging in the mixing of activities in industrial areas. Lands along arterial road frontages are composed of a mix of industrial, office and retail activities, while the interior of industrial areas is dominated by industrial uses. Not all industrial areas follow this structure of development. The Toronto Central Area/Waterfront appears to have a mixed character of development throughout.

There is a significant amount of office space in industrial areas. This is likely to increase, reflecting the growth of information intensive and service sector activities. Office buildings in industrial areas are generally fairly small with most of the large buildings located along arterial roads. Industrial areas have, for the most part, not attracted major office developments.

The scale or density of development in industrial areas is fairly low. The proliferation of office development has generally not increased the density of development in most areas. The scale of development in Weston Road/Junction and Toronto Central Area/Waterfront is higher than in other industrial areas. These areas also have a higher employment density indicating a more labour intensive use of land than in other areas. The newer industrial areas of North-West Etobicoke and Tapscott/Marshalling Yard have a much lower employment density. The implication, especially for the areas with large inventories of vacant industrial land is that in order to accommodate future industrial employment growth, there is a need to maintain much of these industrial lands for industry.

The Toronto Central Area/Waterfront is different from Metro's other industrial areas. Much of the area is undergoing a transition as industry consolidates into a smaller land area and many sites are no longer viable for continued industrial use. Redevelopment of lands may include a range of employment activities, new industrial uses, housing to achieve Metropolitan population and housing objectives and recreational activities in support of Metro's expanding tourism industry. The Port area is one of the few areas in Metro with a significant amount of vacant and underutilized industrial land and has a unique function serving Metro's shipping needs. Studies should be undertaken to identify the Metropolitan interests in the Port area.

5.0 CHANGES OCCURRING IN INDUSTRIAL AREAS

Industrial areas in Metropolitan Toronto are changing, reflecting Metropolitan economic and development trends. This chapter examines the changes that are occurring and assesses their impacts on the future growth and development of industrial lands in Metro Toronto.

5.1 Changes in Employment and Establishments

The Planning Department's Employment Land Use and Assessment data base was created in 1981. In examining the change in employment and establishments we are restricted to only the period 1981-1985, therefore, the conclusions arrived at are limited by the short time period examined.

Employment

Full-time employment in industrial areas declined slightly during the period 1981-1985 (See Table 16) however, some activities have experienced significant changes. Industrial employment has declined sharply mainly in manufacturing-product assembly activities. Retail and institutional employment has increased and office employment declined marginally.

Table 16:

CHANGE IN FULL-TIME EMPLOYMENT IN INDUSTRIAL AREAS 1981-1985

	1981	1985	Change
Industry	240 590	231 487	-9 103
Office	115 705	114 523	-1 182
Retail	51 210	55 082	3 872
Institutional	8 254	9 742	1 488
Recreational	1 556	1 520	-36
Other*	110	2 339	2 229
Total	**417 425**	**414 693**	**-2 732**

* Includes construction, farming, fishing and resource extraction

Source: M.T.P.D., E.L.A. 1981, 1985 Special Run 3.65

While the net loss of industrial employment was 9 103 jobs, small firms have been a source of new industrial jobs and large industrial firms with 500 employees or more have accounted for a significant decline in industrial employment. During the period 1981-1984, out of 82 large industrial establishments in Metro Toronto (most of which are located in industrial areas), twelve closed or relocated out of Metro for a loss of 10 901 jobs, and only two new large establishments emerged creating 1 328 industrial jobs. Layoffs and scaling down of employment needs by industrial firms with 500 plus employees resulted in a further net loss of 18 605 industrial jobs.

Many areas have experienced a net loss of industrial employment totalling 22 855 industrial jobs. Of this loss, 28% was in the Weston Road/Junction, 18% in South-West Scarborough and Southern Etobicoke, 16% in the Don Valley/404 Corridor and 15% in Toronto Central Area/Waterfront. Several of these areas which have a mainly traditional industrial base have experienced a significant decline in industrial employment (Toronto Central Area/Waterfront 10%, Southern Etobicoke 11% and Weston Road/Junction 25%). These latter areas account for much of Metro's industrial base.

Although overall industrial employment has declined, some industrial areas have had an increase in industrial employment totalling 13 752 jobs. Dufferin/Keele South which has a mainly industrial character has accounted for 28% of this growth, North-West Etobicoke 17%, Tapscott/Marshalling Yard 13% and Milliken 11%.

The decline in industrial employment has occurred mainly during the recession of the early 1980's and appears to have levelled off. During the period 1983-1987 the manufacturing/warehouse sector has experienced a growth in employment in Metro Toronto of 13 000 jobs. While this indicates an adjustment reflecting the recovery in the Metropolitan economy, it is not expected that this sector will show a significant increase in the longer term future.

Office employment in industrial areas appears to be following the pattern exhibited in the overall Metropolitan economy. During the period 1981-1985 significant employment growth in office activities has occurred in trade/personal services, finance, insurance and real estate, and in business services. These are also the major growth sectors in the Metropolitan economy. Industrial related office employment has fallen sharply, probably reflecting the overall decline in

manufacturing employment. (See Table 17.) There has also been a significant decline in technical/communications and in government employment in industrial areas.

Table 17:

CHANGE IN FULL-TIME EMPLOYMENT IN OFFICE ACTIVITIES IN INDUSTRIAL AREAS 1981-1985

Finance/Insurance/Real Estate	+3 843	(+87%)
Trade/Personal Services	+3 594	(+21%)
Business Services	+2 163	(+17%)
Health/Associations	+435	(+12%)
Government	-2 681	(-20%)
Technical/Communications	-2 797	(-17%)
Industrial Related	-5 739	(-12%)
Total Office	**-1 182**	

Source: M.T.P.D.; E.L.A. 1981, 1985 Special Run 3.65

Of those industrial areas that have had a net loss in office employment 30% was in the Highway 400 Corridor and also in Toronto Central Area/Waterfront. Of those areas that have had a net growth in office employment 42% was in South-West Scarborough, 19% in Tapscott/Marshalling Yard, 18% in Weston Road/Junction and 14% in Southern Etobicoke.

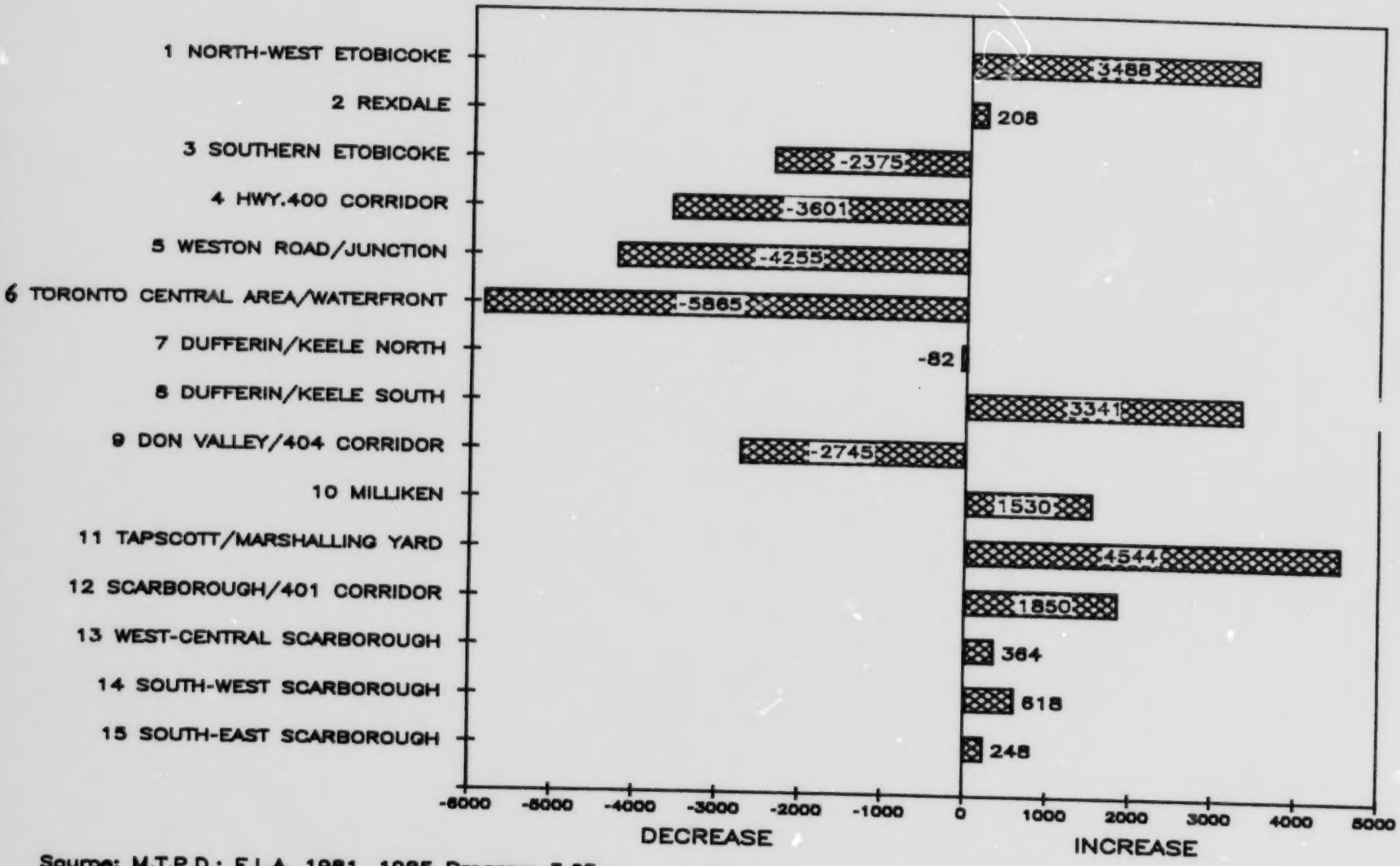
Nine industrial areas have had a net increase in overall employment during the period 1981-1985 totalling 16 191 jobs. Of this growth Tapscott/Marshalling Yard has accounted for 28%, North-West Etobicoke 22% and Dufferin/Keele South 21%. Six industrial areas have had a net loss of employment during the same period totalling 18 923 jobs. Of this loss, 31% was in the Toronto Central Area/Waterfront, 22% in Weston Road/Junction, 19% in the Highway-400 Corridor, 15% in the Don Valley/404 Corridor and 13% in Southern Etobicoke. (See Figure 5.)

Establishments

There has been a net increase of 3 589 establishments in Metro's industrial areas during the period 1981-1985. (See Table 18.) Over 40% of the net new establishments have been in office activities. The retail sector has accounted for 35% of the net growth and industry 20%. Goods processing and product

FIGURE 5

CHANGE IN FULL-TIME EMPLOYMENT IN INDUSTRIAL AREAS 1981-1985



Source: M.T.P.D.; E.L.A. 1981, 1985 Program 3.65

assembly activities have accounted for most of the new industrial establishments. The growth in office establishments has been mainly in business, trade and personal services, while the number of industrial related office establishments has declined by 12%.

Table 18:

CHANGE IN NUMBER OF ESTABLISHMENTS 1981-1985 IN METRO'S INDUSTRIAL AREAS

	No.	As % of Net Growth
Goods processing	315	
Product assembly	202	
Printing/Data Processing	73	
Other manufacturing	87	
Terminal/Trans/Communication	-11	
Warehouse storage	54	
Total Industry	**720**	**20%**
Retail shopping	750	
Retail service	490	
Accommodation	5	
Total Retail	**1 245**	**35%**
Industry Related Office	-254	
Finance/Insurance/Real Estate	78	
Business services	873	
Technical/Communication	124	
Trade/Personal services	488	
Health/Associations	141	
Government	30	
Total Office	**1 480**	**41%**
Institutions	**44**	**1%**
Recreation	**1**	**0**
Other	**99**	**3%**
Total	**3 589**	**100%**

Source: M.T.P.D.; E.L.A. 1985, Special Run 3.65

It is important to note that although employment in industrial areas has declined, **the number of establishments has increased by 22%** during the period 1981-1985. **The creation of a large number of new establishments is a major contributor to new economic growth in industrial areas.**

The industrial areas north of Highway 401 have accounted for 51% of the net growth in establishments and the Toronto Central Area/Waterfront has accounted for 30% of the net growth. Only 19% of the net new establishments have located in the industrial areas south of Highway 401 excluding the Toronto Central Area/Waterfront.

Size of Firm

A number of studies of the national and Metro economies have found that in nearly all sectors, including goods production, small firms account for most of the growth in new establishments and new employment. Over 60% of the net new jobs created in Metro between 1977-1981, and 99% of the net new establishments, have been in firms of less than 50 employees. (Gardner, p. 41.) More recent data indicates that small firms of one or two employees have accounted for the greatest growth in establishments in Metro during the period 1981-1985. (M.T.P.D. Employment Profile of Metropolitan Toronto, 1981-85, p. 56.) While the data is for Metro Toronto as a whole, a similar pattern is likely exhibited in industrial areas. This trend is likely to continue as we move from large-scale capital intensive companies to small scale labour intensive companies in the service sector. Consequently, new firms including manufacturing industries locating in Metro's industrial areas, are generally likely to be small and require small sites. New industries which are labour intensive may be attracted to locating in Metropolitan Toronto by the provision of small industrial or business space units serving an incubator function.

5.2 Growth of Floor Space

The Planning Department's Non-Residential Land Use data bank indicates that from 1977-1985 nearly three million square metres of floor space was added in Metro's industrial areas. Nearly two-thirds of this has been industrial, 21% office and 11% retail. Mixed industrial-commercial space accounts for one-third

of the industrial space and 21% of the total floor space added during this period. It appears that an increasing proportion of the floor space built in industrial areas is in the form of industrial-commercial malls.

During the same period Tapscott/Marshalling Yard, Dufferin/Keele North and the Highway 400 Corridor have accounted for over 40% of the total floor space added. (See Table 19.) Over 20% of the industrial space has located in Tapscott/Marshalling Yard, 16% in Dufferin/Keele North and 13% in the Highway 400 Corridor. Over 30% of the new mixed industrial commercial space built has concentrated in Tapscott/Marshalling Yard and 28% in Dufferin/Keele North.

5.3 Industrial Land Absorption

Absorption of industrial land occurs either through redevelopment of existing sites, development of unused portions of sites, redesignations or development of vacant lands. In the future, as Metro's vacant industrial land inventory contracts, an increasing proportion of industrial land absorption will involve redevelopment and intensification of development on underutilized lands.

Data obtained from Royal LePage indicates that annual absorption of vacant industrial land in Metro Toronto has declined from a high of 206 hectares in 1971 to around 65 hectares in 1986. (See Table 20.) The large decline in absorption experienced after 1981 was likely due to the economic recession. However, following the recovery, it is possible that vacant industrial land absorption may rise though it will likely not equal the rate of absorption experienced in the early 1970's. Figures for 1986 indicate that absorption of industrial land in Scarborough doubled from the previous year and may be returning to pre-recessionary levels. Scarborough, North York and Etobicoke have accounted for almost all of the vacant industrial land absorbed in Metro Toronto since 1972. North York now has only a small amount of vacant land and much of Etobicoke's remaining vacant industrial land is now being developed.

Table 19:

DISTRIBUTION OF GROSS FLOOR SPACE BUILT BETWEEN 1977-1985 IN INDUSTRIAL AREAS

	Manufac-turing	Mixed Industrial/ Commercial	Warehouse	Other	Total Industry	Office	Retail	Institution	Recreation	Other	Total
North-West Etobicoke	9.5%	4.9%	9.6%	1.8%	7.2%	7.3%	7.0%	.0%	.0%	.0%	6.8%
Rexdale	7.1	2.2	7.6	.5	4.9	7.2	1.6	.0	.0	.0	4.8
Southern Etobicoke	19.0	1.3	5.3	7.2	9.3	4.7	4.3	3.0	.0	.0	7.4
Highway 400 Corridor	18.0	8.1	21.1	.0	13.4	7.0	11.6	26.9	19.4	.0	11.5
Weston Road/Junction	1.9	.0	2.5	47.9	6.5	16.5	8.8	38.7	.0	24.6	9.7
Toronto Central Area/Waterfront	2.4	.0	.4	11.3	2.2	9.1	8.1	.0	.0	36.6	5.6
Dufferin/Keele North	13.1	27.6	3.7	9.8	15.5	2.2	17.7	29.0	.0	5.3	12.6
Dufferin/Keele South	3.3	.0	.1	1.9	1.4	1.5	2.0	.0	.0	.0	1.4
Don Valley/404 Corridor	.9	9.7	5.7	.5	4.6	20.2	3.8	.0	16.8	19.1	8.3
Milliken	3.7	6.5	1.6	.5	3.8	.4	1.1	.0	.0	3.6	2.8
Tapscott/Marshalling Yard	11.3	32.4	28.1	10.3	21.3	10.3	12.6	2.4	.0	9.8	17.4
Scarborough/401 Corridor	6.0	5.3	12.9	.7	6.5	7.3	4.6	.0	21.2	.0	6.2
West-Central Scarborough	.1	.9	1.0	.0	.5	1.0	3.0	.0	16.5	.0	.9
South-West Scarborough	1.9	.6	.3	.1	1.0	5.3	13.9	.0	26.0	.2	3.3
South-East Scarborough	2.0	.6	.0	7.7	1.8	.0	.0	.0	.0	.8	1.2
Total Industrial Areas	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: M.T.P.D.; E.L.A. 1985 Special Run 3.64

In the future, the take up of vacant industrial land will occur mainly in Scarborough. However it appears that significant amounts of vacant industrial land in Scarborough are being held off the industrial market. The reasons for this are not clear but some speculation pending the process of establishing higher valued uses is assumed.

As many industrial areas in Metro become no longer viable for traditional industry and other areas attract a broader range of economic activities than the remaining vacant industrial land inventory becomes critical for accommodating manufacturing and other industrial development. By the end of the century, Metro is faced with the prospect of having little if any vacant industrial land. Metro needs to maintain a significant portion of its remaining vacant industrial land to accommodate future industrial growth.

The Tapscott/Marshalling Yard area and to a lesser extent three other areas (Scarborough/401 Corridor, Rexdale, and North-West Etobicoke) account for most of Metro's vacant industrial land. These areas with large vacant sites serve as a location for new industrial development in Metropolitan Toronto. Given these and other factors, they should generally be maintained for future industrial development.

5.4 The Changing Economy of Industrial Areas

The economy of industrial areas is changing. The restructuring of the Canadian and Metropolitan economies and the adoption of new technologies have implications on the future development of industrial areas and their economic sectors.

Industrial Sector

While Metro's industrial sector is undergoing continued growth, it is being affected by overall economic trends. Manufacturing industries are being caught

Table 20:

INDUSTRIAL LAND ABSORPTION IN METROPOLITAN TORONTO 1972-1986
(in hectares)

Year	Scarborough*	Etobicoke	North York	East York	York	Toronto	Metropolitan Toronto
1972	41.7	61.6	102.9	-	-	-	206.2
1973	70.4	54.2	80.9	-	-	-	205.5
1974	87.4	51.0	25.9	-	-	-	164.3
1975	69.2	38.9	18.2	-	-	-	126.3
1976	34.0	18.6	20.2	-	-	-	72.8
1977	67.6	12.1	11.7	-	-	2.0	93.4
1978	49.0	39.7	7.7	-	-	-	96.4
1979	59.9	23.1	33.6	4.9	-	-	121.5
1980	50.2	4.0	10.1	-	-	-	64.3
1981	66.8	14.2	36.0	-	-	3.6	120.6
1982	13.9	6.1	N/A	-	-	N/A	20.0
1983	14.6	16.6	N/A	-	-	N/A	31.2
1984	14.4	21.4	N/A	-	-	N/A	35.8
1985	24.3	15.4	N/A	-	-	N/A	39.7
1986	52.6	12.0**	N/A	-	-	N/A	64.6

Source: Royal LePage Commercial Real Estate Services

* City of Scarborough Economic Development Department

** Estimate provided by City of Etobicoke Planning Department

N/A Not Available

in a squeeze between competitive pressure from lower cost producers in newly industrializing countries and more efficient producers in technologically advanced countries. Increased foreign competition, lower wages overseas, rationalization of production by international companies, plant closings and "downsizing" to eliminate excess capacity have resulted in a loss of manufacturing jobs in Metro. In this evolving industrial economy, Metro plays a significant role as an industrial incubator.

The critical issue for Metro is the development of new industries and improvement of the efficiency and competitiveness of existing industry. A continuation of present economic trends seems to favour the development of specialized production, high quality manufacturing (such as the fashion industry), a range of new industrial uses and high technology industries which undertake a high level of research and development to improve products and processes. The gradual shift from standardized to more specialized production and the automation of labour intensive production operations, currently located overseas, may lead to a resurgence in manufacturing industry in Metro Toronto. In adopting new technologies, our industries may become more competitive and a Metropolitan location more desirable.

Industry will continue to be an important economic sector in industrial areas. It is a major user of services and provides spin-offs to other sectors of the economy. Industrial space will continue to grow in Metro as new industrial growth is attracted here. But it must be realized that while manufacturing will remain a major employer in industrial areas, we cannot look to it as a major source of new employment growth. The growth of new industrial activities will continuously create new employment but this may only offset job losses due to restructuring, rationalization and relocation. Some industrial areas will experience a net growth in industrial employment while in others it will decline. Overall, however, industry will remain a vital source of output and wealth in the economy of industrial areas. **Metropolitan policy should emphasize the importance of industry in the economy and help create an adequate environment for the continuation of industrial activities.**

Growth of New Industrial Uses

Computer based technological innovations coupled with economic factors are changing the nature of industry. They are creating a whole new range of industrial activities. The application of advanced technologies and business techniques on existing industries is leading to the development of new employment activities such as research and development, data processing, film and video production and computer related activities. New industrial uses will serve as major growth sectors in industrial areas.

However, it is often difficult to classify these activities in land use terms. They are not traditional manufacturing industries. The physical environment of these uses more closely resembles office uses than factory space of traditional manufacturing activities. But with the changing nature of industry and the shift to the post-industrial society, these new activities appear to be the shape of our new industry. **There is a need to update the Metropolitan industrial policy to reflect and respond to these changes.**

Growth of Service Sector

Metro's industrial areas are likely to experience continued pressures to accommodate the growth of service sector activities. Areas of potential growth include consumer services and personal services such as restaurants and day care facilities.

More significant is the growth of producer or business services. In a recent study, it was found that many business services have a propensity to locate in suburban areas (Gad, 1985). These include data processing centres, chartered accountants, lawyers and a range of business consultants. Sales offices also tend to open branch offices to be close to clients. Many of these services may locate in industrial areas. In addition, in the modern business environment, industrial uses require business services. Modern business practices are leading to a mixing of industrial and business services in industrial areas. It is thought that generally the types of service firms locating in Metropolitan Centres are different from those locating in industrial areas. However, there is a need to monitor the locational trends so as to ensure that growth of these uses in industrial areas is not affecting the growth of Metropolitan Centres.

Adoption of New Technology

The adoption of technological innovations in industry has significant implications on Metro's industrial areas. In Metro, manufacturing industries adopting new technologies may relocate outward. Industries which are more capital intensive requiring large sites will have a tendency to locate in the surrounding regions. The adoption of the "just-in-time" inventory system, which involves the delivery of parts and materials to the production line just when they are needed, may lead to the following:

- a reduction in the warehouse space needed by both parts suppliers and manufacturing and assembly operations;
- a significant increase in truck deliveries, thus adding to the number of movements on the road system;
- plants and suppliers may locate in close proximity so as to minimize delivery times.

The use of this system will likely increase the number of firms locating in the Toronto Region. For example, auto parts suppliers may continue to concentrate in the Toronto Region to be near the automobile production plants. However, industries in Metro located near residential areas or with poor transportation access may relocate. Adoption of "just-in-time" heightens the importance of good access for industry.

Transportation accessibility is becoming even more important in the industrial location decision. Some large trucking firms in Metro are likely to relocate to the surrounding regions due to better accessibility. In addition, the increase in retail traffic in industrial areas may negatively impact the transportation system for industrial users. The significance of truck deliveries for industry emphasizes the importance of maintaining transportation accessibility on Metropolitan roads. **There is a need to maintain industrial areas next to key transportation access locations (e.g., highway routes and Pearson Airport) and ensure adequate accessibility for industrial users.**

With the increasing importance of information and services in industry, industrial buildings will increasingly have to be able to accommodate highly complex

telecommunications networks and computer systems. The computerization of manufacturing plants may tend to favour locating manufacturing operations in newer buildings and render older industrial buildings obsolete for manufacturing. Older industrial buildings may require extensive changes to accommodate these new systems. When conversion is not economical or feasible, these buildings may undergo reuse or redevelopment to other economic activities or possibly even residential uses. New uses for older buildings may include retail superstores and self-service storage facilities.

The adoption of technological innovations in all types of industry and the location of employment activities requiring highly advanced computer and telecommunications systems in industrial areas, emphasizes the need to ensure that industrial areas have a sophisticated communications infrastructure network. For example, automated production activities, data processing centres and high technology activities may require a more advanced communications infrastructure than currently exists in some of Metro's industrial areas.

Most of Metro's industrial areas are relatively new and are well suited to the technological trends. But Metro also has a significant number of older industrial areas containing older buildings. The viability of these areas and buildings could be impacted by their ability to adopt new technologies.

Revitalizing Older Industrial Areas

Industries which are unable to compete and adapt to the economic and technological changes will probably decline. Some industrial areas may no longer be economically viable for existing traditional industry and undergo decline, as is the case for the Massey Ferguson lands in Toronto. The Department recently supported an amendment to permit amongst other uses, hi-technology, service and computer related activities on the Massey Ferguson industrial lands in the hope that this would lead to revitalization of the area. Other industrial areas may require similar treatment. **The Metropolitan industrial policies should seek to reverse the decline and decay of these older industrial areas by encouraging and supporting the development of policies to revitalize these areas.** This may include technical and financial assistance to area municipal planning exercises.

The Port Industrial Area is undergoing a transition and uncertainty exists as to its future. It appears that port related activities are declining in significance thereby leading to a reduction in industrial activities. The Port Area faces many problems in attracting industry such as its relative isolation from the rest of the region, poor services and competition for development from new industrial areas in Metro and elsewhere in the Region. Due to many factors the context of the Port Area in Metro may be reasonably viewed as changing. It is time that the Metropolitan interest for this area be examined.

5.5 Conclusions

Pressure will continue on industrial areas to develop for a mix of activities. The economy of industrial areas will be characterized by a changing industrial sector which will provide continued economic growth but little overall employment growth. In order to ensure continued growth and health of our industrial areas, Metropolitan policies should indicate the importance of industry in the economy, provide a suitable environment for maintaining traditional industrial activities as well as broaden the economic base of industrial areas to accommodate new industrial uses.

Metropolitan industrial policies should give recognition that industry includes not only traditional manufacturing, processing and warehousing activities, but also the broader range of new industrial uses. There is also a need to accommodate the growth of service sector activities. This includes both consumer services as well as business services. But growth of these uses in industrial areas should be limited.

Growth in industrial areas will likely be in specialized production, high quality manufacturing, new industrial uses, high technology industries and service sector activities. New growth will probably continue to centre on the establishment of a large number of new small firms. This should provide industrial areas with the flexibility needed to replace declining non-competitive activities. New industries are more likely to be small and require small sites, thus there is a need to provide small industrial or business space units serving an incubator function. Capital intensive industries requiring large sites will tend to locate outside Metro. Labour intensive industries will likely become the major form of industry in central areas of Metro.

An increasing proportion of new floor space will likely be in the form of mixed industrial-commercial space. Tapscott/Marshalling Yard, which has accounted for much of the recent growth in employment and floor space in Metro's industrial areas, will likely continue this pattern because of its large inventory of vacant industrial lands.

By the end of the century Metro is faced with the prospect of having little if any vacant industrial land. The Tapscott-Marshalling Yard area, as well as Scarborough/401 Corridor, Rexdale and North-West Etobicoke are the only remaining areas with large inventories of vacant industrial land in Metro. It is in the Metropolitan interest to maintain these industrial lands to accommodate future industrial growth.

The use of the "just-in-time" system by industry may lead to increased movements on the regional road system and emphasizes the importance of ensuring transportation accessibility for industry.

Some older industrial areas which currently account for much of Metro's industrial base may experience continued decline in traditional industrial activity. Older industrial areas which are no longer economically viable for existing industry should be encouraged to attract new industrial uses and other economic activities. Revitalization of these areas should be a Metropolitan policy objective.

With a decline in port related activities and problems in attracting industry to the port industrial lands, the context of the Port Area in Metro may be viewed as changing. It is time that the Metropolitan interest for this area be examined.

The changes occurring in the Metropolitan economy are reflected in the changing character of Metro's industrial areas and have implications on the future of industry in Metro. Metro's Official Plan policies for industrial areas should give recognition to these shifts and the policies should be updated so as to respond and reflect these transformations. This will ensure a continued role for industry in Metro and continued economic growth of Metropolitan industrial areas.

6.0 METRO WITHIN THE REGIONAL CONTEXT

Industrial development in Metro must be viewed within the broader context of the Toronto Region. In the past twenty-five years the regions surrounding Metro Toronto (See Figure 6) have attracted an increasing proportion of industrial growth. Metro's ability to compete in the Region is affected by a number of considerations. Factors which come into play in the location decisions of industrialists and industrial land developers include: availability of trained labour force; location (access, proximity to markets and suppliers, proximity to urban centres); image/prestige considerations; personal considerations of management; need for expansion space; and costs of development (land, taxes, etc.). Some of these factors are similar throughout the Region.

This section reviews development of Metro's industrial areas within the Regional framework and examines selected factors relating to industrial development and growth where there may be a Metro/Regional comparative advantage.

6.1 Industrial Development in the Surrounding Regions

Industrial development in the Toronto Region is progressing outward with continued growth in the Regions of Peel, York, Durham and Halton. The pattern of development in the Toronto Region has traditionally favoured a western orientation. In recent years there has been some shift to the north-central part of the Region i.e. York Region.

The regions surrounding Metro Toronto possess a huge inventory of designated industrial land: over 24 000 hectares with 45% of that located in Peel, 22% in Durham, 17% in York and 16% in Halton. (See Table 21.) Nearly 60% of this land is vacant. As shown on Table 21, Peel has the largest amount of vacant industrial land followed by Durham, York and Halton.

The Regions of York, Peel and Durham have experienced strong growth in industrial land absorption since the early 1960's. (See Table 22.) Industrial land

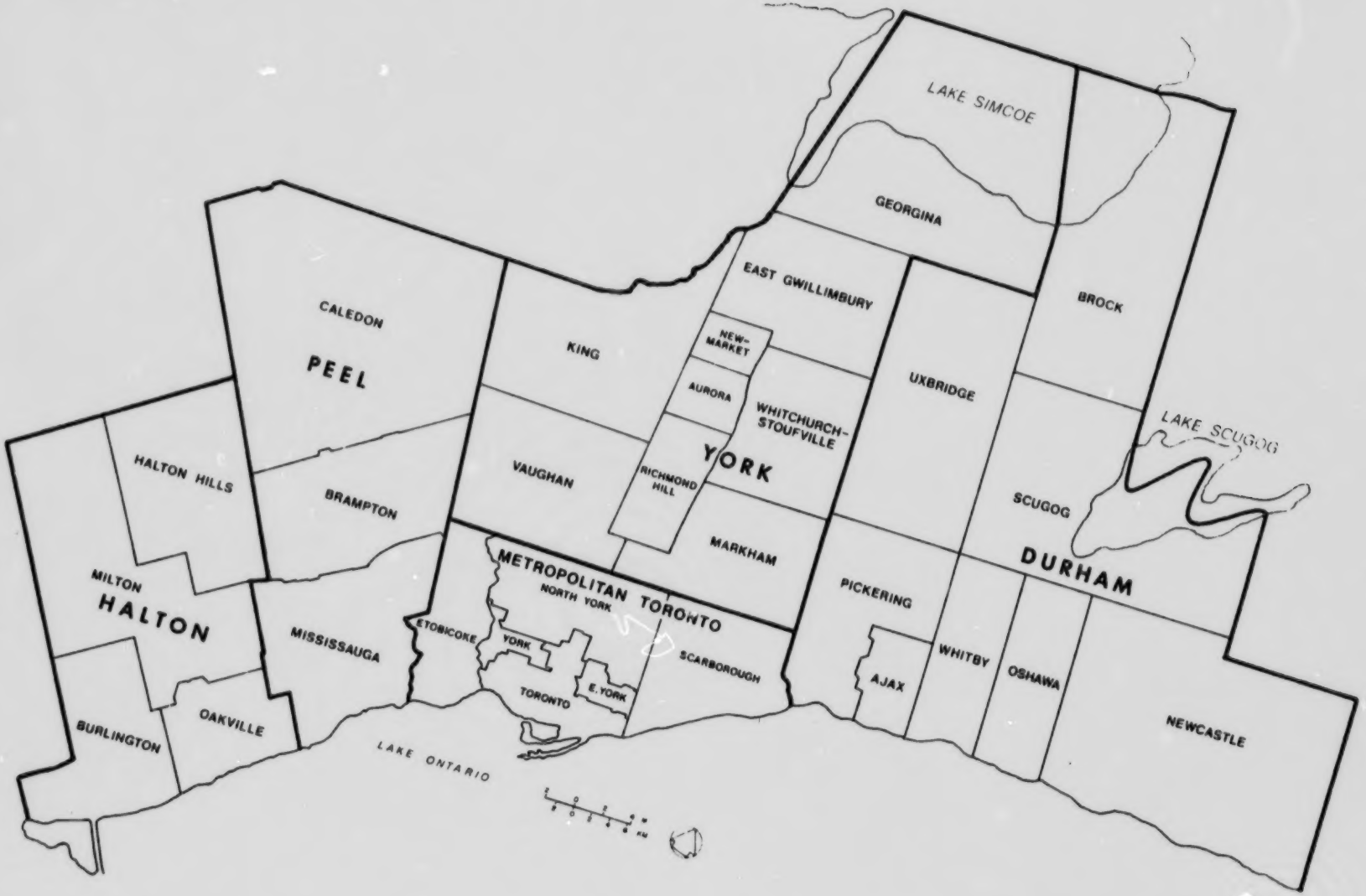


FIGURE 6

THE TORONTO REGION

absorption has been highest in Peel but, since the early 1980's, growth has shifted somewhat northward to the Region of York. During the period 1976-1985 the surrounding regions have had an annual average absorption of 336 hectares of industrial land.

Data from the Toronto Real Estate Board indicates that the areas outside Metro Toronto contain about 14 704 000 square metres of industrial floor space (including industrial and commercial floor space in industrial areas). (See Table 23.) About 64% of this is located in the West Fringe (Brampton, Mississauga and Oakville), 30% in the North Fringe (Aurora, Markham, Richmond Hill and Vaughan), and 6% in the East Fringe (Ajax and Pickering).

From 1977 to 1986, industrial floor space in the fringe areas has increased by 5 576 900 square metres or 61%: 55% in the West Fringe, 89% in the North Fringe and 26% in the East Fringe. Overall however, the West Fringe has accounted for 60% of the increase in the industrial floor space in the fringe areas during the period 1977 to 1986, the North Fringe 37% and the East Fringe 3%. It is apparent that the major growth in the fringe is occurring in the Regions of Peel and York. Since 1983, the rate of growth in the North Fringe has been much higher than in the other fringe areas indicating a shift in growth to the Region of York. However, the large inventory of vacant industrial land in Peel means that it should continue to dominate growth in industrial floor space in the fringe in the longer term.

6.2 Prospects for Metro in the Region

The vast majority of Metro's industrial land (83%) is developed, whereas well over half of the industrial land in the surrounding regions is still vacant. Although Metro Toronto contains 28% of the designated industrial land in the Toronto Region, it accounts for only 8% or 1 249 hectares of the Region's vacant industrial land inventory of 15 603 hectares. (See Table 21.) The Region of Peel accounts for 39%, Durham 23%, York 16%, and Halton 14% of the vacant industrial land in the Toronto Region. **The nature of industrial development in Metro Toronto will likely differ from that in the surrounding regions due to the increasing scarcity of vacant industrial land in Metro.**

Table 21:

INDUSTRIAL LAND INVENTORY IN THE TORONTO REGION 1986
(in hectares)

Municipality	Designated Industrial Land	% of Toronto Region	Vacant Industrial Land	% of Toronto Region
Metro Toronto*	**9 232.0**	**27.6%**	**1 249.0**	**8.0%**
Vaughan	2 197.5	6.6%	1 286.5	8.2%
Markham	1 434.7	4.3%	760.4	4.9%
Richmond Hill	536.2	1.6%	409.6	2.6%
York Region	**4 168.4**	**12.5%**	**2 456.5**	**15.7%**
Mississauga	7 649.2	22.9%	4 290.2	27.5%
Brampton	3 217.4	9.6%	1 881.8	12.1%
Peel Region	**10 866.6**	**32.5%**	**6 172.0**	**39.6%**
Burlington	2 026.3	6.1%	1 322.2	8.5%
Oakville	1 846.6	5.5%	855.1	5.5%
Halton Region	**3 872.9**	**11.6%**	**2 177.3**	**14.0%**
Durham Region**	**5 297.7**	**15.8%**	**3 548.6**	**22.7%**
Toronto Region	**33 437.6**	**100.0%**	**15 603.4**	**100.0%**

Source: Royal LePage

* M.T.P.D., E.L.A. 1985, Special Run 3.64

** Based on 1982 assessment records

Table 22:

INDUSTRIAL LAND ABSORPTION IN THE TORONTO REGION 1961-1985
(in hectares)

	1961-1966**		1966-1971**		1971-1976**		1976-1980*		1981-1985*	
	hectares	% of Toronto Region	hectares	% of Toronto Region	hectares	% of Toronto Region	hectares	% of Toronto Region	hectares	% of Toronto Region
York Region	187	7.8%	475	17.4%	268	10.2%	400	24.7	720	33.5%
Durham Region	54	2.3	96	3.5	247	9.3	N/A	N/A	N/A	N/A
Peel Region	784	32.8	1 025	37.7	1 282	48.5	772	47.7	1 187	55.0
Metro Toronto	1 367	57.1	1 126	41.4	847	32.0	448	27.6	247	11.5
Toronto Region	**2 392**	**100.0%**	**2 722**	**100.0%**	**2 644**	**100.0%**	**1 620**	**100.0%**	**2 154**	**100.0%**

N/A Not available

Source: * Royal LePage Commercial Real Estate Services

** A.E. LePage, Town of Richmond Hill Economic Development Strategy Study: Final Summary Report, June 1983

Except for parts of Scarborough and Etobicoke most industrial areas in Metro have little vacant industrial land. In these areas, of greater significance is the underutilized land that is available for expansion of existing industries and lands that can be severed and developed separately. The North York Planning Department reported in 1985 that 85-90 hectares of industrial land were significantly underutilized. (City of North York, Planning and Development Department 1985, p. 16). The Scarborough Economic Development Department estimates that Scarborough has 468 hectares of industrial land available for expansion or severable to create new vacant lots (City of Scarborough Economic Developoment Department, 1986, p. 132). As the vacant industrial land supply in Metro's industrial areas decreases, continued growth in many areas will increasingly take the form of intensification of development through infill and expansion as well as through redevelopment. Growth in the surrounding regions however will continue to centre on the development of vacant industrial lands.

Metro Toronto's share of the Region's industrial land absorption has dropped significantly in recent years. It has declined from a high of 57% during the period 1961-1966 to only 12% during 1981-1985. Notwithstanding the availability of more than 1 200 hectares of vacant industrial land in Metro, the decline in absorption rates may be attributed to the fact that industrial land in the surrounding regions may be more attractive for industry. The Tapscott industrial area however appears to be well positioned to compete with the surrounding regions for new industrial development.

Metro Toronto accounts for 65% of the industrial floor space in the Toronto Region, down from 71% in 1978. Although Metro accounts for most of the Region's industrial floor space, the rate of growth in the surrounding regions is higher. Since 1983 the actual increase in industrial floor space has been greater in the surrounding regions.

The continuing growth and development of industrial lands in the surrounding regions will likely impact Metro Toronto's competitiveness and ability to attract certain types of industry. In the outlying regions the emphasis is in attracting new manufacturing and other industries. Firms which are capital intensive and

Table 23:

INDUSTRIAL FLOOR SPACE INVENTORY IN THE TORONTO REGION
(in square metres)

	1978		1982		1986	
Metro Toronto	**22 760 600**	**71.4%**	**24 678 200**	**69.0%**	**26 864 900**	**64.6%**
West Fringe	6 131 400	19.2	7 503 600	21.0	9 474 100	22.8
North Fringe	2 322 500	7.3	2 831 300	7.9	4 378 400	10.5
East Fringe	673 500	2.1	769 700	2.2	851 800	2.0
Total Fringe	**9 127 400**	**28.6**	**11 104 600**	**31.0**	**14 704 300**	**35.4**
Total Toronto Region	**31 888 000**	**100.0%**	**35 782 800**	**100.0%**	**41 569 200**	**100.0%**

Source: The Toronto Real Estate Board,
Industrial, Commercial Investment Annual Report 1978-1986

require large sites will have a tendency to locate in these areas. In Metro the primary concern is in maintaining existing industry, attracting industrial uses to areas with vacant lands and re-using industrial lands no longer viable for existing industrial uses to accommodate new industrial activities. Within central areas of Metro new industries which are labour intensive will likely become the dominant form of industry. These development activities combine to support and strengthen the Toronto Region as an economic unit. The success of the surrounding regions in attracting industrial development is beneficial to firms in Metro and conversely Metro's industrial growth is beneficial to the rest of the Region.

6.3 Land Costs

Table 24 presents a comparison of prices for serviced industrial land in the Toronto Region. Within Metro, a number of sites have been selected to illustrate the price range for industrial land.

There is quite a range in price for serviced industrial land in Metro Toronto. Lands along the Don Valley-404 Corridor from Eglinton Avenue up to Steeles Avenue, which includes industrial areas and Office Parks, have some of the highest prices in Metro. It appears that good transportation accessibility together with planning regulations permitting the land to be put to higher value office uses are important factors leading to the high land values in this area. Industrial lands along the Highway 401 corridor in Scarborough also have a high price range due to a great extent to their good highway exposure and ability to accommodate office development. The price range in Southern Etobicoke is lower possibly as a result of the older character of the area.

In the rest of the Toronto Region prices for industrial land vary quite significantly. Mississauga, Markham and Vaughan share a similar price range to that of Metro Toronto. The high demand for these lands is the result of the proximity of these areas to Metro Toronto and their good transportation routes both into Metro and through the Region. The recent improvements to Highways 403 and 404 have increased the accessibility of these locations. The development of prestige industrial areas accommodating industrial, high technology and office uses likely also pushes up the price of land.

The price range of land in Brampton is significantly lower than in the above municipalities. Prices in Burlington, Oakville, Pickering, Ajax, Whitby and Oshawa are the lowest in the Toronto Region. Low land prices in these municipalities are likely reflective of their poorer accessibility to Metro Toronto and downtown Toronto. Major transportation improvements in these outer fringe municipalities in the future will likely enhance their desirability and increase industrial land prices.

Table 24:

COMPARATIVE COST OF SERVICED INDUSTRIAL LAND

Municipality	Price/Acre
Metro Toronto	
Ø Highway 404-Steeles	$350 000 - $500 000
Ø Leaside/Flemingdon	$300 000 - $500 000
Ø Scarborough 401 Corridor	$275 000 - $325 000
Ø Highway 400 Corridor	$225 000 - $275 000
Ø Southern Etobicoke	$190 000 - $200 000
Ø Northern Etobicoke	$150 000 - $200 000
Ø Tapscott	$145 000 - $190 000
# Toronto Port Area	$200 000 - $250 000
* Mississauga	$150 000 - $350 000
* Markham/Vaughan	$175 000 - $325 000
* Brampton	$125 000 - $175 000
* Oakville/Burlington	$75 000 - $110 000
* Pickering, Ajax, Whitby, Oshawa	$30 000 - $175 000

Source: * Royal LePage, Canadian Real Estate - 1987. P. 32.

Ø Royal LePage, Industrial Property Mart 1986. P. 20-21.

Toronto Real Estate Board, 1986 Industrial Land Values

Some of Metro's industrial land is priced below some areas in the surrounding regions. For example, Tapscott which contains large amounts of vacant land, is competitively priced to lands in the adjacent regions. The large price differential of industrial land in Metro Toronto, as compared to the outer fringe municipalities, may lead some types of industrial firms which require large sites or do not require or cannot afford a Metro site to locate in the outer regions. Existing industries which require additional space for expansion may be expected to remain at their existing location if space is available. Increasingly however, industries requiring additional space may locate in the surrounding regions especially if their present building is old. Some industrial areas in Metro will likely continue to develop to a higher level and more specialized uses. For example, the Highway 404 corridor has a high concentration of high technology activities and fashion related industries are concentrating in the King-Spadina area.

6.4 Realty and Business Taxes

Industrial and commercial properties are subject to both a realty tax and business tax. The realty assessment applies to the building and land upon which it is situated. The realty tax is arrived at by multiplying the realty assessment by the mill rate. Table 25 presents the average industrial realty tax per square foot for municipalities in the Toronto area.

Municipalities within Metro Toronto tax industry at a much higher rate on a per square foot basis than do the municipalities in the surrounding regions. Industrial realty taxes are generally double those in the regions of Peel, York and Durham. Similar conclusions have been noted in other studies (see, for example, Richmond and Zamparo 1982, and City of Scarborough Economic Development Department, 1986). One explanation for the high rate of taxation in Metro Toronto is that Metro provides a greater range and higher levels of municipal services than do the surrounding regions.

Table 25:

1985 INDUSTRIAL REALTY TAXES IN THE TORONTO AREA*
(average per square foot)

Toronto	$1.10	Richmond Hill	$.64
East York	1.05	Mississauga	.60
York	1.04	Brampton	.59
Etobicoke	1.08	Vaughan	.57
North York	1.05	Markham	.55
Scarborough	1.17	Pickering	.54

Source: Toronto Real Estate Board,
Industrial Commercial Investment Annual Report 1986

* Averages for properties with buildings of 20 000 square feet G.F.A., 10% office and 20 foot ceiling height.

In addition to the realty tax, municipalities also charge a business tax on industrial and commercial properties. The business assessment is a designated percentage of the realty assessment. The combined industrial realty and business tax in Metro is about double that in the surrounding municipalities.

The effect of taxation on the location decision of industry is not clear. Industrialists and industrial land developers surveyed in a recent provincial study indicated that taxation is only one factor in the location decision (Ministry of Municipal Affairs, 1986). However, a survey of industrial developers conducted for the Gardner report indicated that the differential in the tax rate is probably significant when considering a site adjacent to Metro's borders. (Gardner, 1983, p. 45). Consequently, when comparing sites in Metro just south of Steeles Avenue, for example, to sites just north in Markham and Vaughan, Metro Toronto appears to be at a significant disadvantage.

6.5 Development Costs

Industrial development is subject to lot levies, impost charges or development levies. These charges pass on the development cost to the user rather than

putting all the costs of development onto the general taxpayer. A recent survey of lot levy practice in Ontario found that none of the regional municipalities in the Toronto Region impose levies on industrial development. (C.N. Watson and Associates, 1985) But great variations exist in the levies imposed by the local municipalities. (See Table 26.) Toronto and Scarborough have the highest levies in Metro Toronto while East York and York do not impose any levies. Some municipalities in the surrounding regions do not have industrial levies. Although Vaughan and Mississauga have the highest levies in the Toronto Region, this does not appear to have a negative impact on their industrial development since they have been experiencing high industrial growth.

Table 26:

LEVIES IMPOSED ON INDUSTRIAL DEVELOPMENT

Metro Toronto	None
East York	None
York	None
Etobicoke	$2 471/ha+
North York	$2 000/ha
Scarborough	$4 375/ha
Toronto	$5.38/square metre G.F.A.
Durham	None
Pickering	None
Ajax	None
Oshawa	None
Whitby	None
Halton	None
Burlington	$5 600/ha
Oakville	None
Peel	None
Brampton	None
Mississauga	$30 238/ha
York	None
Markham	$2 500/ha
Richmond Hill	None
Vaughan	$0-$17 438/ha

Source: C.N. Watson and Associates Ltd.
1985 Survey of Lot Levy Practice in Ontario

A range of other charges are levied by municipalities on industrial development making it difficult to compare the total charges. Some municipalities have charges for rezonings. A few make use of Section 215 of the Municipal Act to impose special charges for the provision of sanitary, storm sewer and water supply services. Additional charges are also levied by most municipalities for sewer and water hook-ups and roads.

Development levies are absorbed into the selling price of land. They do not appear to be a significant factor in the location decision of industrial firms and likely do not affect industrial growth in the regions comprising the Toronto Region.

6.6 Housing

The provision of housing is a factor in the location of industry. Industries require a large pool of labour and will generally locate where the labour supply meets their needs and the housing supply meets the needs of their employees. In the surrounding regions development of large residential areas is attractive to industry, providing a large source of labour. Ownership housing in these regions is more moderately priced than in Metro, a fact which may accelerate the movement of firms out of Metro to locations more affordable for employees.

However, the surrounding regions lack the substantial supply of social housing and private rental housing available in Metro. Consequently, industries dependent on low skilled workers will likely remain in Metro.

6.7 Conclusion

As the surrounding regions attract an increasing level of industrial growth and Metro's inventory of vacant industrial land diminishes, the nature of industrial development in Metro will likely differ from that in the rest of the Toronto Region. Growth in the surrounding regions will continue to centre on the development of vacant lands. Capital intensive industry requiring large sites will likely locate in these regions. Within central areas of Metro, new industries

which area labour intensive will likely become the dominant form of industry. **Parts of northern Scarborough which still has significant vacant lands will compete for new growth with the rest of the region.** These lands appear to be competitively priced to industrial lands in the adjacent regional municipalities. **However, in most industrial areas in Metro, continued growth will increasingly be in the form of intensification of development through infill, expansion, redevelopment and reuse of lands no longer viable for existing industrial uses. Metropolitan policy should address the transition that industrial areas are facing by guiding such change.**

Many factors affecting the location decision of industrial development are similar throughout much of the Region. In some other factors there is to some extent a Regional comparative advantage over Metro. The availability of large tracts of vacant land in the surrounding regions provides a choice for industries requiring large sites. As the Toronto Region is a single economic unit, industries can locate on cheaper land outside Metro while still remaining within the same economic market. While the combined industrial realty and business tax in Metro is about double that in the surrounding municipalities, taxation is only one factor in the location decision. But the large yearly tax saving may be significant when considering a location immediately adjacent to Metro.

Industries requiring low skilled workers will likely remain in Metro due to the large supply of social housing and moderately priced private rental units available here. However, at the other end of the spectrum the very high cost of housing in Metro will lead an increasing number of firms to consider moving from Metro to locate in more affordable areas in the Region. Many industrial areas in Metro will likely develop to higher level and more specialized uses.

Industrial growth in Metro and growth in the regions are not incongruent. The success of parts of the region in attracting industrial development benefits firms in Metro and vice versa. The differing industrial strategies and interests of Metro Toronto and the other regions come together to strengthen the Toronto Region as an economic unit.

7.0 CONCLUSIONS AND RECOMMENDATIONS

While traditional industrial activity continues to be the predominant land use in industrial areas it is becoming more common place for a broader range of economic activities to occur both in accordance with existing policy and by amendment. Non-industrial economic activities and the types of industrial uses generally found are frequently compatible as industrial development takes on more of the appearance and operating character of commercial development. This report has found that in the mixing of uses in industrial areas a structuring of uses is occurring. Area municipalities are undertaking major revisions to their Official Plans establishing a development structure for industrial areas. Therefore it is timely that the Metropolitan interest be discussed.

A basic Metropolitan planning objective is ensuring that Metropolitan Toronto has an effective economic base to accommodate future economic growth. This involves the provision of a variety of economic activities both to support and revitalize the current employment base and provide for new employment opportunities. The Metropolitan Official Plan sets out an urban economic structure to accommodate future employment growth. Industrial areas are one of the types of employment areas.

Manufacturing is the single most important economic sector in industrial areas providing employment and economic growth to Metro. The manufacturing sector also provides direct spin-offs to other sectors of the economy and is an important user of services and a significant tax base. A strong industrial sector should continue to be supported as being in the direct interest of Metro Toronto. It is in the Metropolitan interest to maintain industrial land for industry. In the development of industrial areas, priority should be given to the industrial use so as to ensure that Metro has sufficient land to accommodate future industrial growth. Development of other uses in industrial areas should be structured to ensure functional, environmental and economic compatibility with industry.

Support for industry is part of a Metropolitan interest in providing a range of employment opportunities to support and strengthen overall economic growth. A diversity of employment activities provides Metro with relative stability during

economic downturns. It is also tied to a social goal of maintaining industrial land for industry so as to provide a variety of jobs for Metro residents.

To support these economic and land use objectives it is also a Metropolitan interest to ensure that Metro Toronto has an efficient transportation system designed to accommodate the movements of people, goods and services.

The policies for industry and industrial areas in the Official Plan correspond with the Metropolitan interests discussed above. The policy has a primary objective to protect the majority of vacant and developed industrial land to accommodate future industrial growth by limiting the development of non-industrial uses and limiting the amount of industrial land redesignated to other uses. While these policies are generally appropriate, consideration should be given to broadening their scope to address the broader range of new industrial uses, deal with the heavy service orientation of Metropolitan Toronto's economy and provide more explicit direction in the structuring of development. While the Official Plan establishes a Metropolitan preference for a hierarchy of location for new office development, that hierarchy now requires more explicit expression in the framing of policies which permit office uses within industrial areas.

7.1 Concept

Section 3.E of the Official Plan outlines a concept for industrial areas. The policy indicates a goal of increasing industrial jobs and maintaining industrial land for industry. While the policy aims to limit the development of non-industrial uses in industrial areas, a more explicit expression structuring the location of these uses would assist in the development of industrial lands. This report indicates that industrial areas are not homogeneous and contain a significant level of non-industrial activities.

While industrial areas should be maintained primarily for industry, we recognize that non-industrial uses will continue to seek to locate in industrial areas. Their development should be based on minimizing the conflict with existing industry and maximizing opportunities for the use of public transit.

This report indicates that Metropolitan Toronto has a limited supply of vacant industrial land. The Tapscott industrial area and to a lesser degree the Scarborough/401 Corridor, Rexdale and North-West Etobicoke are the remaining areas in Metro with a significant amount of vacant industrial land. It is in the Metropolitan interest to maintain these industrial lands to accommodate future industrial growth.

It is recommended that:

1. **The existing policy of attempting to increase industrial jobs and maintaining industrial land for industry should be reconfirmed. The policy should be clarified to provide for the redevelopment of obsolete traditional industrial lands. Vacant industrial lands that are viable and suitable for industry should be maintained as industrial areas.**

2. **The Official Plan should be amended to structure development of industrial areas so as to provide for a greater intensity of employment activities along arterial roads than in other areas while maintaining the integrity of the arterial road network.**

3. **Limited development of office, retail and service-commercial uses in industrial areas should be in a context in which development of these uses has a higher priority in Centres, Office Parks and commercially designated areas.**

7.2 Industrial Definition

Although the Official Plan has left the definition of industry to the area municipalities it has an implied definition of industry as being manufacturing warehousing and processing activities. While this interpretation continues to reflect a good deal of existing industry, it can be interpreted as an administrative impediment to the current directions of new industrial activities which reflect technological advances and the evolving character of the Metropolitan economy. In order for Metropolitan policy to keep abreast with this situation, it is recommended that:

4. **The Official Plan should include a definition of industry to include such uses as manufacturing, assembly and processing; servicing and repair; storage and**

warehousing; transportation and utilities; research and development; communications and broadcasting; data processing, computer production, software development and related uses.

7.3 Structure

Although industry is the dominant sector in most industrial areas, this report indicates that a variety of other uses including offices, retail, institutional and other commercial uses as well as community facilities are also located in industrial areas. Offices uses in industrial areas are seen as serving an important role providing business services for manufacturing industries. It is also felt through proper siting the small scale nature of offices does not need to threaten the stability of the surrounding industrial area. Given that the overall trend is for the office sector to increase in employment, it is reasonable to assume that there will be a continued demand for office space in industrial areas.

A range of retail and service-commercial uses have also developed in industrial areas. Some are providing a service to industry and employees and many are serving the needs of the surrounding community. An increasing number of companies appear to be utilizing part of their facilities for retailing products that are manufactured, assembled or warehoused on site. Some commercial uses such as retail-warehouses may not be easily accommodated in designated commercial areas and may be more appropriate in an industrial location.

As industrial areas attract an increasing mix of uses, a development structure is required in order to protect land for industry from competing uses while also accommodating the broader range of economic activities. Sub-section 5.D.2.b and c of the Official Plan provides for the structuring of commercial and office uses in industrial areas. While a structure is suggested, a more explicit direction for development is required if the Metropolitan interests are to be properly expressed.

It is in the Metropolitan interest to relate higher density development and higher concentrations of employment including consumer oriented activities to Metropolitan infrastructure systems of roads, transit, piped and emergency

services. Such development should be compatible with the continued operation of existing industry and relate to the adequacy of the transportation system. This report concludes that in structuring development in industrial areas, a greater range of uses and more intense development may be appropriate along arterial roads than in other parts of industrial areas. In achieving this structure, access to development on an arterial road should be provided from the local road system so as to minimize the number of access points along arterial roads.

It is recommended that:

5. **The Official Plan contain statements to provide for the structuring of development in industrial areas on the following basis:**

   i) **Lands abutting an arterial road (including local arterial roads specified by the area municipality) may be used for industrial uses and a range of non-industrial uses which do not threaten the continued operation of existing industry. These uses may include office, retailing including retail-warehousing, service-commercial uses, institutions and community facilities.**

      - **Area Municipal Official Plans should identify locations where non-industrial uses may be permitted.**
      - **The scale and density of development should support the Metropolitan priority for development in Centres, near rapid transit stations, and in Office Parks.**
      - **Development should be consistent with the distribution and capacity of the water supply and sewerage systems.**
      - **Development should also meet the following transportation objectives:**

         a) **relate to the capacity of the transportation system; and**

         b) **minimize the number of access points along arterial roads by providing access to development on an arterial road from the local road system where possible.**

ii) **Lands not abutting arterial roads should be maintained primarily for industrial uses.**

- **Area municipalities may also permit compatible low scale, grade related office and service-commercial uses, institutional uses and community facilities on these lands.**
- **These uses should be functionally, environmentally and economically compatible with the continuing operation of industry in an area.**
- **Density of development should relate to the adequacy of the road system, availability of public transit, and the distribution and capacity of sewerage and water services.**

7.4 Revitalization

Due to the evolving character of the Metropolitan economy some industrial areas are undergoing a decline and may no longer be viable for continued existing industrial use. It is in the Metropolitan interest to revitalize these areas with priority given to new industrial uses so as to support the industrial base of the area. Area municipalities are encouraged to broaden their economic base and increase employment opportunities by attracting other economic activities to lands which are no longer functional for traditional industrial uses. In some cases to support other objectives of the Metropolitan Official Plan, other uses such as housing may be considered. An urban design component addressing such matters as streetscape, environmental issues and heritage should be included as part of any revitalization policies. The Metropolitan Plan should encourage the revitalization of declining industrial areas in order to promote their continued growth and development so as to achieve Metropolitan economic and social objectives. This could be achieved through financial and technical assistance to special studies and improvement to Metropolitan infrastructure and services.

It is recommended that:

6. **The Official Plan should be revised to include a statement encouraging area municipalities to identify specific industrial areas undergoing or likely to experience a significant decline in the economic health of existing**

traditional industrial activities. Where such areas have been identified Metropolitan Toronto should encourage and support the development of policies to revitalize such areas with an aim of seeking economic activities that would support the economic base of the area giving priority to new industrial uses. Where that is not possible, then other uses may be considered which support other objectives of the Official Plan and which are in the context of an overall plan for the area. A revitalization plan should also include policies addressing urban design matters.

7.5 Redesignation of Industrial Land

The current Metropolitan Plan makes provision for the redesignation of industrial land to non-industrial use and requires consideration of several criteria in the evaluation of redesignation proposals.

The criteria address three major issues:

(1) The Plan places importance in maintaining industrial lands to accommodate 45,000 additional jobs in all industrial areas for the period 1976-2001. There is some difficulty in accurately assessing the implications of individual redesignations to the larger employment goal. The majority of redesignations involve small sites which individually have little impact on achieving the long term employment target. Most redesignations have been for other economic activities which tended to result in more jobs on the site than any assumed industrial use. Consequently the relevance of the employment projection as a criterion for a site specific redesignation proposal relates to larger areas proposed to be redesignated to non-employment uses. In this context, we will re-evaluate the 45,000 additional job figure projected for the 1976-2001 period.

(2) Redesignations may have potential land use implications on the continued viability of the surrounding industrial area and adjacent industrial uses. The issue has been that a new use may become a potential objector to existing industrial uses. This concern remains and should be considered in any revision to the current policy.

(3) Various transportation facilities are seen by the Official Plan as playing a major role in supporting industrial uses. These include rail lines, expressways, airports, the harbour and port and rapid transit facilities. This report notes that increasingly, accessibility to and movement along certain transportation facilities such as arterial roads and expressways are critical to many industries. Consequently it is important to maintain industrial lands with good transportation accessibility.

Relatively few industrial areas have good accessibility to rapid transit facilities. Proposals to redesignate land along rapid transit facilities for more intensified development really has to do with office, retail and institutional uses. Section 5.E. of the Plan pertaining to other areas, specifically encourages such development. This also relates to an objective of the Plan to structure development to maximize utilization of the service and transportation infrastructure. Consideration should be given to including a criterion which relates the redesignation to lands within a specified distance from a rapid transit station.

In summary, modifications to the criteria would assist in the examination of redesignations with a greater relationship to current industrial development needs, other employment activities and strategic elements of the Plan. This report presents a clear concept for the development of industrial areas: maintain industrial land for industry and structure development to permit a greater range and intensity of uses along arterial roads. It is felt that the recommendations contained in this report adequately address most redesignation proposals by indicating the types of uses to be permitted in industrial areas, outlining a structure of location and density and encouraging the revitalization of some industrial areas. Amendments to area municipal Official Plans to redesignate industrial land should be consistent with the recommendations of this report. In addition, it is suggested that redesignation proposals may also relate to other objectives of the Official Plan relating to Centres and lands adjacent to rapid transit stations.

It is recommended that:

7. **The Official Plan redesignation policy should be revised to indicate that amendments to area municipal Official Plans to redesignate industrial land should be consistent with the recommendations of this report or relate to other objectives of the Metropolitan Official Plan such as the policies for Centres and lands within approximately 300 metres of a rapid transit station.**

7.6 Port Area

The Port Area has historically been dominated by shipping and various heavy industrial activities including oil storage tanks, public utilities and outside storage yards. The district has a significant amount of underutilized land. It is undergoing a transition due to the decline in port activities and its future is uncertain. Due to the uniqueness of the Port serving shipping needs of the region, the Port's potential for further employment generation, the implications for infrastructure (particularly roads and transit), and water related activities, Metropolitan Toronto has an interest in the future of this area. Various agencies and levels of government are undertaking studies of this area. If these plans are to gain acceptance, all levels of government have to work co-operatively and a process has to be developed to prepare a plan that reflects the interests of all jurisdictions.

It is recommended that:

8. **The Metropolitan Toronto Planning Department should undertake a study to define the Metropolitan interests in the Port area in co-operation with other levels of government.**

7.7 Conclusion

Metro Toronto's industrial areas are undergoing significant changes reflecting global economic forces and the adoption of new technologies. Industrial areas are well positioned to adapt to changes in the Metropolitan economy. They appear to possess the flexibility needed to attract new industrial development

and replace declining, non-competitive uses with new economic and employment generating activities. While the policies for industrial areas contained in the Official Plan have been found by this review to be generally appropriate, expansion of the policies to deal with the broader range of new industrial uses and other economic activities and to provide more explicit direction in structuring of development and review of redesignations are proposed. This study recommends maintaining industrial land for industry and the adoption of policies which recognize the differences and individual needs of Metro's industrial areas. This would ensure a continued vital role for industry in Metro Toronto while also broadening the economic base of some areas which are undergoing a transition. It is believed that from this Official Plan Review, policies can be established which provide direction for the future development of industrial areas.

APPENDIX

APPENDIX 1

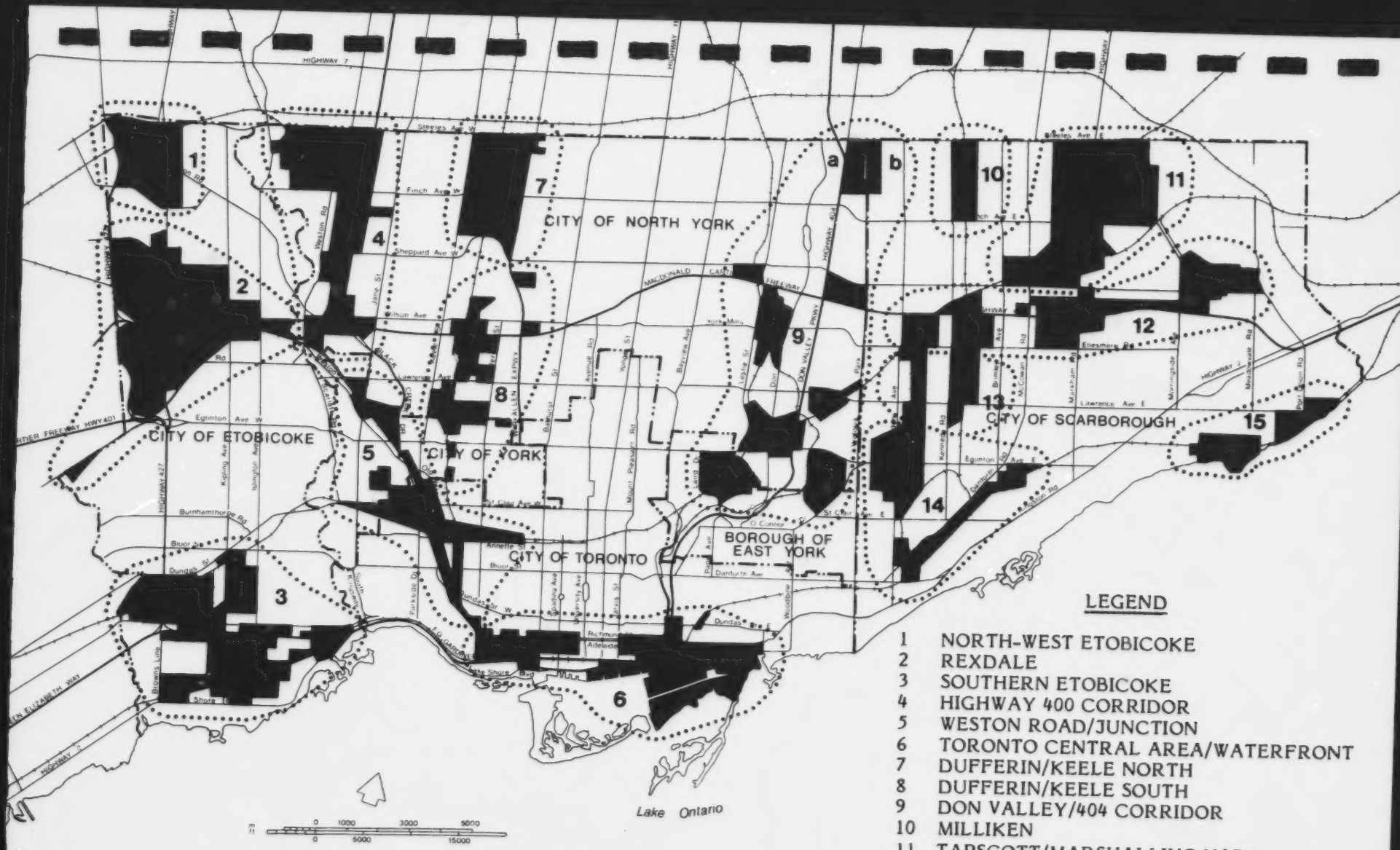
Appendix 1 is comprised of the following tables and maps:

A1.1	Total Metropolitan Toronto Industrial Areas Statistical Summary
A1.2	North-West Etobicoke Industrial Area Statistical Summary
A1.3	Rexdale Industrial Area Statistical Summary
A1.4	Southern Etobicoke Industrial Area Statistical Summary
A1.5	Highway 400 Corridor Industrial Area Statistical Summary
A1.6	Weston Road/Junction Industrial Area Statistical Summary
A1.7	Toronto Central Area/Waterfront Industrial Area Statistical Summary
A1.8	Dufferin/Keele North Industrial Area Statistical Summary
A1.9	Dufferin/Keele South Industrial Area Statistical Summary
A1.10	Don Valley/Highway 404 Corridor Industrial Area Statistical Summary
A1.11	Milliken Industrial Area Statistical Summary
A1.12	Tapscott/Marshalling Yard Industrial Area Statistical Summary
A1.13	Scarborough/Highway 401 Corridor Industrial Area Statistical Summary
A1.14	West-Central Scarborough Industrial Area Statistical Summary
A1.15	South-West Scarborough Industrial Area Statistical Summary
A1.16	South-East Scarborough Industrial Area Statistical Summary

The data for these tables is taken from the Planning Department's Employment, Land Use and Assessment data bank and is based on the special runs listed below:

Land Use	-	Special Run 3.64
Employment	-	Special Run 3.65
Establishments	-	Special Run 3.65
Employment by Parcel Code	-	Special Run 3.62
Size of Firm	-	Special Run 3.16

Due to different definitions used for the categories in Special Run 3.16, the data is not comparable with that in Special Run 3.65.



a. North York has designated this a Business Park
b. Scarborough has designated this a Business District

FIGURE 3 INDUSTRIAL AREAS IN METROPOLITAN TORONTO

Table A1.1:

TOTAL METROPOLITAN TORONTO INDUSTRIAL AREAS STATISTICAL SUMMARY 1985

LAND USE

Land Use (ha)		
Industry	5 383	58.0%
Retail	835	9.0
Office	909	10.0
Institutional	222	2.3
Recreation	216	2.2
Open Space	350	4.0
Vacant	1 249	13.5
Other	88	1.0
Total	9 232	100.0%

Vacant Land (ha)	
Along Arterial Roads	476.0
Along Non-arterial Roads	773.0

Office Buildings	
Number	316
Site Area (ha)	547.32
G.F.A. (m^2)	2 630 138
Office F.A. (m^2)	1 382 989
Office Employment	50 591
Other Employment	16 184
Total Employment	66 775

FLOOR SPACE

Gross Floor Area (m^2)		
Industry	16 481 981	68.0%
Retail	3 152 781	13.0
Office	3 616 622	15.0
Institutional	463 044	2.0
Recreation	125 532	.5
Other	331 083	1.5
Total	24 131 803	100.0%

Gross Floor Area by Type by Year Built			
	Unknown	Pre-1977	1977-1985
Industry	390 141	14 169 187	1 882 613
Retail	111 274	2 720 923	320 582
Office	177 578	2 828 943	610 101
Institutional	1 334	442 974	18 716
Recreation	5 519	109 307	10 706
Other	19 809	192 884	118 390
Total	705 675	20 464 220	2 961 108

EMPLOYMENT

Full-time Employment 1985		
Industry	231 487	56.0%
Retail	55 082	13.0
Office	114 523	28.0
Institutional	9 742	2.0
Recreation	1 520	-
Other	2 339	1.0
Total	414 693	100.0%

Full-time Employment by Road Type 1985		
	Arterial	Non-Arterial
Industry	52 272	179 215
Retail	18 896	36 186
Office	34 316	80 207
Institutional	4 441	5 301
Recreation	990	530
Other	828	1 511
Total	111 743	302 950

Full-time Employment by Parcel Code	
Industrial Employment	
- On Industrial Parcels	210 102
- On Non-industrial Parcels	21 385
Non-industrial Employment	
- On Industrial Parcels	67 643
- On Non-industrial Parcels	115 563

Full-time Employment by Size of Firm					
	Employees/Firm				
	1-9	10-99	100-499	500+	Total
Mfg./Whse.	11 349	81 629	94 225	36 225	223 428
Retail	7 525	13 752	5 120	563	28 962
Service	9 283	13 198	7 314	4 179	33 976
Office	16 892	47 383	29 001	21 245	114 523
Other	872	4 138	3 215	5 579	13 804
Total	45 923	162 102	138 875	67 793	414 693

Change in Full-time Employment 1981-1985	
Industry	-9 103
Retail	3 872
Office	-1 182
Institutional	1 488
Recreation	-36
Other	2 229
Total	-2 732

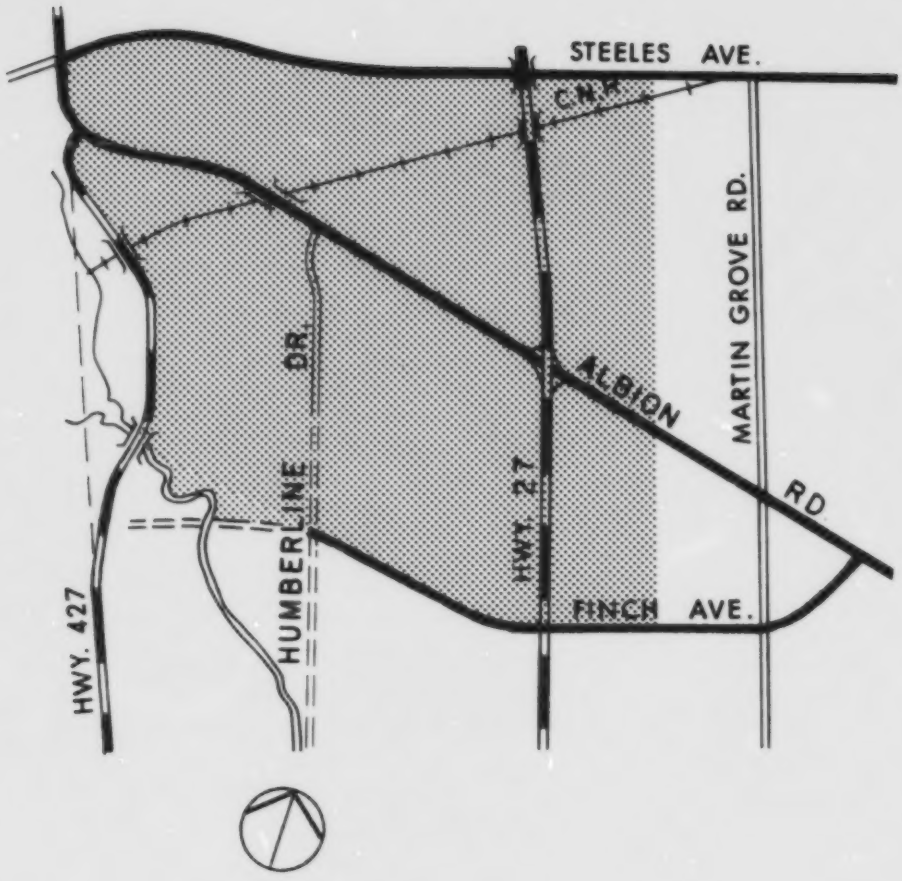
ESTABLISHMENTS

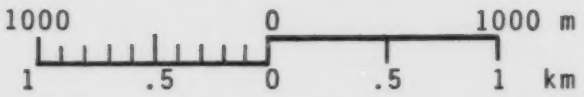
Number of Establishments		
Industry	6 118	31.1%
Retail	5 990	30.4
Office	7 116	36.2
Institutional	220	1.1
Recreation	125	.6
Other	109	.6
Total	19 678	100.0%

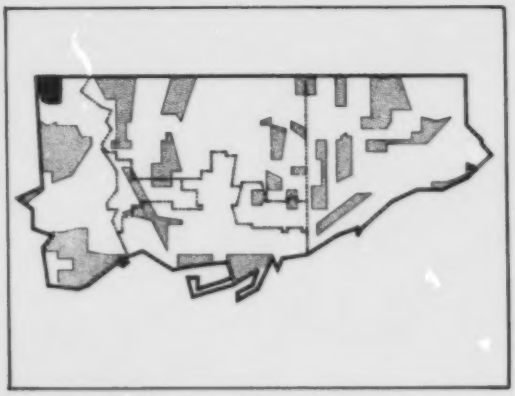
Number of Establishments by Size of Firm					
	Employees/Firm				
	1-9	10-99	100-499	500+	Total
Mfg./Whse.	2 832	2 610	515	41	5 998
Retail	2 205	628	35	1	2 869
Service	2 584	614	36	4	3 238
Office	5 102	1 826	163	25	7 116
Other	278	155	16	8	457
Total	13 001	5 833	763	79	19 678

Change in Number of Establishments 1981-1985	
Industry	720
Retail	1 245
Office	1 480
Institutional	44
Recreation	1
Other	99
Total	3 389

INDUSTRIAL AREA 1: NORTH-WEST ETOBICOKE







Key Map: Metropolitan Toronto

Table A1.2:
NORTH-WEST ETOBICOKE INDUSTRIAL AREA STATISTICAL SUMMARY 1985

LAND USE

Land Use (ha)		
Industry	211	51.0%
Retail	19	4.6
Office	52	12.6
Institutional	0	-
Recreation	3	.7
Open Space	34	8.1
Vacant	95	23.0
Other	0	-
Total	414	100.0%

Vacant Land (ha)	
Along Arterial Roads	11.20
Along Non-arterial Roads	83.76

Office Buildings	
Number	7
Site Area (ha)	6.97
G.F.A. (m^2)	21 297
Office F.A. (m^2)	17 639
Office Employment	1 185
Other Employment	55
Total Employment	1 240

FLOOR SPACE

Gross Floor Area (m^2)		
Industry	526 218	81.0%
Retail	41 638	6.0
Office	80 691	13.0
Institutional	831	-
Recreation	0	-
Other	534	-
Total	649 862	100.0%

Gross Floor Area by Type by Year Built			
	Unknown	Pre-1977	1977-1985
Industry		391 093	135 125
Retail		19 332	22 306
Office		36 277	44 364
Institutional		831	0
Recreation		0	0
Other		534	0
Total		448 067	201 795

EMPLOYMENT

Full-time Employment 1985		
Industry	4 536	55.0%
Retail	1 099	13.0
Office	2 466	30.0
Institutional	23	.3
Recreation	24	.3
Other	131	1.0
Total	8 279	100.0%

Full-time Employment by Road Type 1985		
	Arterial	Non-Arterial
Industry	487	4 049
Retail	413	686
Office	279	2 187
Institutional	0	23
Recreation	11	13
Other	0	131
Total	1 190	7 089

Full-time Employment by Parcel Code	
Industrial Employment	
- On Industrial Parcels	4 110
- On Non-industrial Parcels	426
Non-industrial Employment	
- On Industrial Parcels	1 308
- On Non-industrial Parcels	2 435

Full-time Employment by Size of Firm					
	Employees/Firm				
	1-9	10-99	100-499	500+	Total
Mfg./Whse.	302	2 050	2 184	0	4 536
Retail	84	539	0	0	683
Service	242	214	0	0	456
Office	443	1 521	302	0	2 466
Other	24	154	0	0	178
Total	1 095	4 498	2 686	0	8 279

Change in Full-time Employment 1981-1985	
Industry	2 389
Retail	277
Office	726
Institutional	-13
Recreation	-22
Other	131
Total	3 488

ESTABLISHMENTS

Number of Establishments		
Industry	157	33.0%
Retail	122	26.0
Office	182	38.0
Institutional	2	1.0
Recreation	6	1.0
Other	6	1.0
Total	475	100.0%

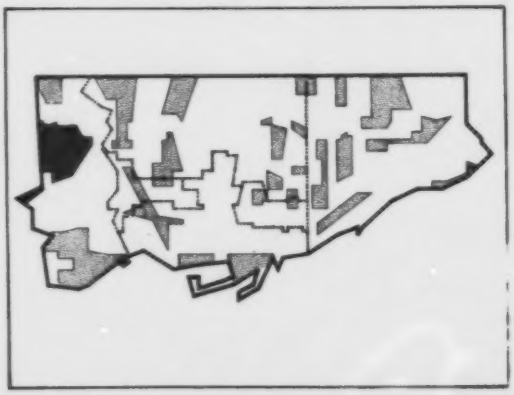
Number of Establishments by Size of Firm					
	Employees/Firm				
	1-9	10-99	100-499	500+	Total
Mfg./Whse.	70	74	13	0	157
Retail	30	20	0	0	50
Service	59	13	0	0	72
Office	120	59	3	0	182
Other	8	6	0	0	14
Total	287	172	16	0	475

Change in Number of Establishments 1981-1985	
Industry	75
Retail	39
Office	13
Institutional	-1
Recreation	1
Other	6
Total	133

INDUSTRIAL AREA 2: REXDALE

Airport Strip Office Park as designated in Figure 6 of the Metropolitan Official Plan

* Has been redesignated Commercial



Key Map: Metropolitan Toronto

Table A1.3:

REXDALE INDUSTRIAL AREA STATISTICAL SUMMARY 1985

LAND USE

Land Use (ha)		
Industry	397	37.0%
Retail	91	9.0
Office	137	13.0
Institutional	47	4.5
Recreation	13	1.0
Open Space	45	4.0
Vacant	114	11.0
Other	5	.5
Total	1 049	100.0%

Vacant Land (ha)	
Along Arterial Roads	29.426
Along Non-arterial Roads	84.631

Office Buildings	
Number	28
Site Area (ha)	31.36
G.F.A. (m^2)	194 598
Office F.A. (m^2)	137 607
Office Employment	4 730
Other Employment	599
Total Employment	5 329

FLOOR SPACE

Gross Floor Area (m^2)		
Industry	1 634 571	69.0%
Retail	131 853	7.0
Office	513 032	22.0
Institutional	16 089	1.0
Recreation	2 266	-
Other	16 624	1.0
Total	2 334 437	100.0%

Gross Floor Area by Type by Year Built			
	Unknown	Pre-1977	1977-1985
Industry		1 542 570	92 001
Retail		146 879	4 976
Office		468 992	44 040
Institutional		16 089	0
Recreation		2 266	0
Other		16 624	0
Total		2 193 420	141 017

EMPLOYMENT

Full-time Employment 1985		
Industry	23 206	58.0%
Retail	4 638	12.0
Office	8 561	22.0
Institutional	1 797	5.0
Recreation	768	2.0
Other	504	1.0
Total	39 474	100.0%

Full-time Employment by Road Type 1985		
	Arterial	Non-Arterial
Industry	4 121	19 085
Retail	1 812	2 826
Office	1 323	7 236
Institutional	236	1 561
Recreation	738	10
Other	504	0
Total	8 776	30 698

Full-time Employment by Parcel Code	
Industrial Employment	
- On Industrial Parcels	22 164
- On Non-industrial Parcels	1 042
Non-industrial Employment	
- On Industrial Parcels	4 586
- On Non-industrial Parcels	11 682

Full-time Employment by Size of Firm					
	Employees/Firm				
	1-9	10-99	100-499	500+	Total
Mfg./Whse.	631	7 310	11 578	3 352	22 871
Retail	273	1 209	450	565	2 497
Service	570	1 536	370	0	2 476
Office	1 016	4 720	2 821	0	8 561
Other	27	145	422	2 473	3 069
Total	2 517	14 920	13 641	6 392	39 474

Change in Full-time Employment 1981-1985	
Industry	-1 230
Retail	1 035
Office	-650
Institutional	585
Recreation	-36
Other	504
Total	208

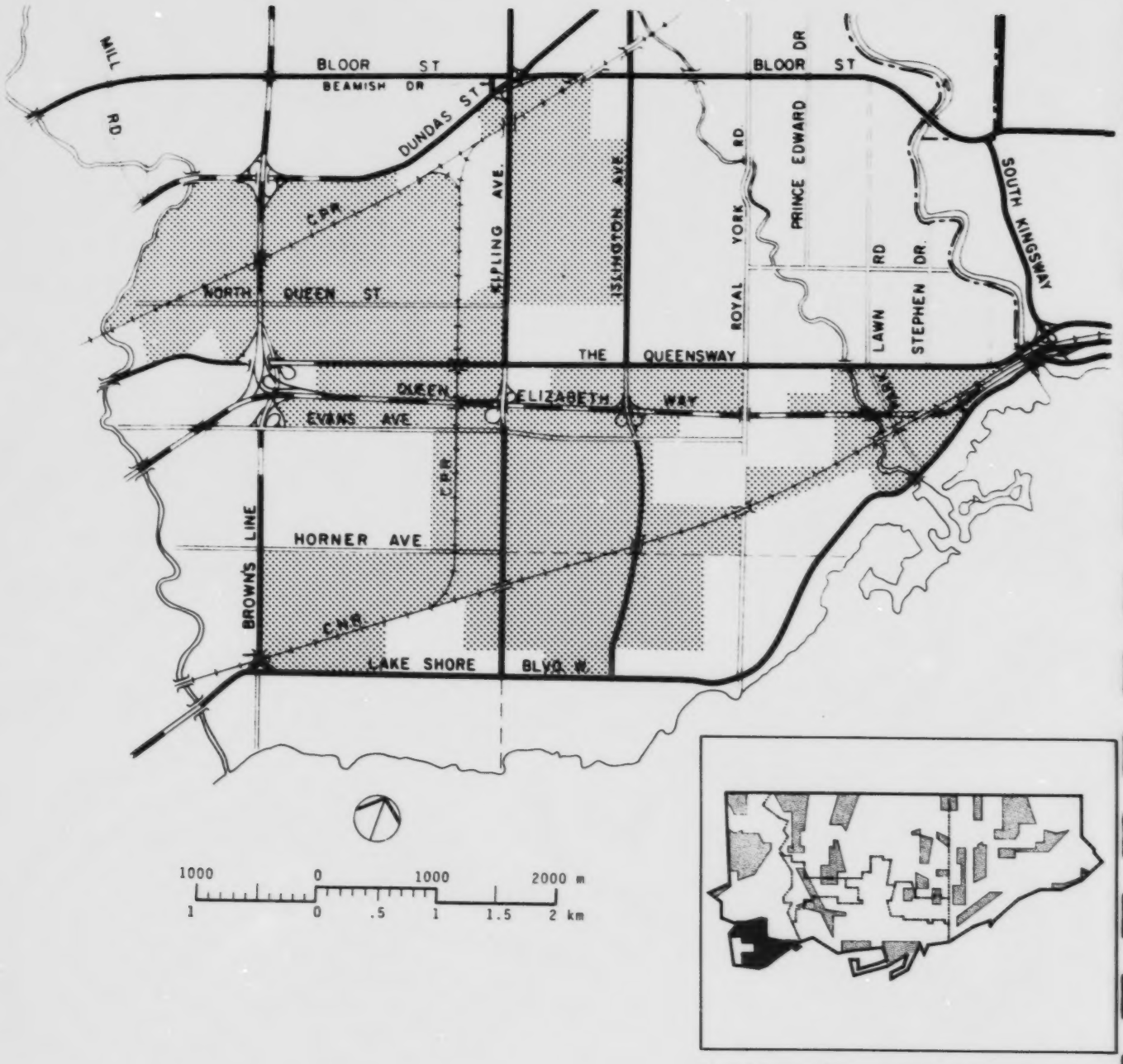
ESTABLISHMENTS

Number of Establishments		
Industry	441	36.0%
Retail	311	26.0
Office	446	37.0
Institutional	11	1.0
Recreation	3	-
Other	2	-
Total	1 214	100.0%

Number of Establishments by Size of Firm					
	Employees/Firm				
	1-9	10-99	100-499	500+	Total
Mfg./Whse.	136	226	62	5	429
Retail	60	51	2	1	114
Service	139	67	3	0	209
Office	237	172	17	0	446
Other	5	6	2	3	16
Total	597	522	86	9	1 214

Change in Number of Establishments 1981-1985	
Industry	4
Retail	78
Office	106
Institutional	6
Recreation	0
Other	2
Total	196

INDUSTRIAL AREA 3: SOUTHERN ETOBICOKE



Key Map: Metropolitan Toronto

Table A1.4:
SOUTHERN ETOBICOKE INDUSTRIAL AREA STATISTICAL SUMMARY 1985

LAND USE

Land Use (ha)		
Industry	747	73.0%
Retail	110	11.0
Office	93	9.0
Institutional	20	2.0
Recreation	4	.5
Open Space	14	1.5
Vacant	19	2.0
Other	10	1.0
Total	1 023	100.0%

Vacant Land (ha)	
Along Arterial Roads	.461
Along Non-arterial Roads	18.482

Office Buildings	
Number	24
Site Area (ha)	44.4
G.F.A. (m^2)	157 449
Office F.A. (m^2)	97 632
Office Employment	3 587
Other Employment	902
Total Employment	4 489

FLOOR SPACE

Gross Floor Area (m^2)		
Industry	2 494 319	77.3%
Retail	316 739	10.0
Office	330 023	10.0
Institutional	41 517	1.0
Recreation	10 413	.3
Other	28 006	1.0
Total	3 221 019	100.0%

Gross Floor Area by Type by Year Built			
	Unknown	Pre-1977	1977-1983
Industry	929	2 318 800	174 590
Retail		302 807	13 932
Office		301 213	28 810
Institution		40 931	566
Recreation		10 413	0
Other		28 006	0
Total	929	3 002 192	217 898

EMPLOYMENT

Full-time Employment 1985		
Industry	31 715	64.0%
Retail	5 999	12.0
Office	11 247	22.0
Institutional	556	1.0
Recreation	17	-
Other	233	1.0
Total	49 767	100.0%

Full-time Employment by Road Type 1985		
	Arterial	Non-Arterial
Industry	8 245	23 470
Retail	2 139	3 860
Office	3 440	7 807
Institutional	104	452
Recreation	4	13
Other	0	233
Total	13 932	35 835

Full-time Employment by Parcel Code	
Industrial Employment	
- On Industrial Parcels	30 893
- On Non-industrial Parcels	822
Non-industrial Employment	
- On Industrial Parcels	4 989
- On Non-industrial Parcels	13 063

Full-time Employment by Size of Firm					
	Employees/Firm				
	1-9	10-99	100-499	500+	Total
Mfg./Whse	824	10 038	13 506	5 355	29 743
Retail	550	1 623	662	0	2 835
Service	1 108	1 442	2 029	557	5 136
Office	1 418	4 418	3 732	1 679	11 247
Other	63	374	369	0	806
Total	3 963	17 915	20 298	7 591	49 767

Change in Full-time Employment 1981-1985	
Industry	-4 077
Retail	123
Office	1 221
Institutional	149
Recreation	-12
Other	221
Total	-2 375

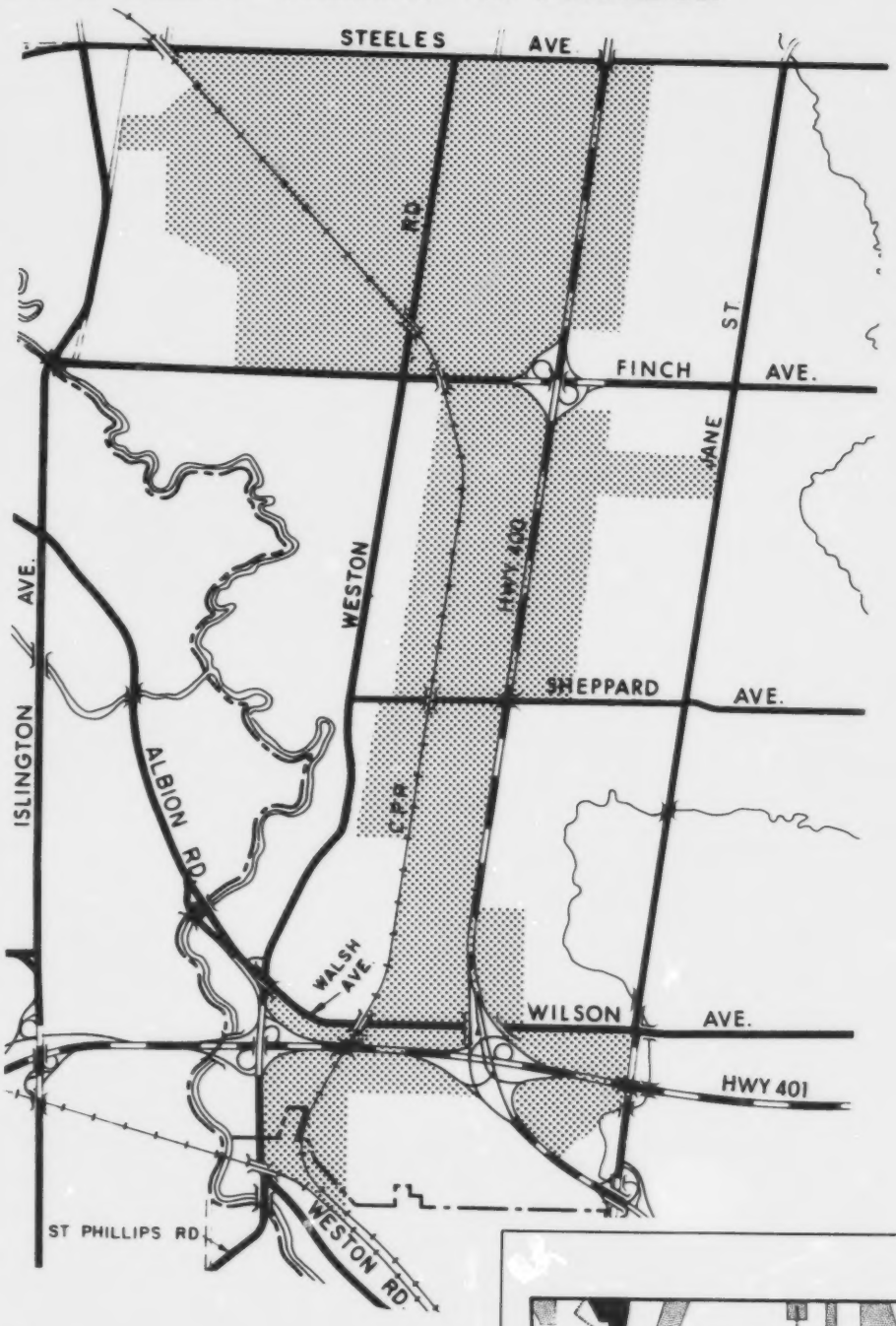
ESTABLISHMENTS

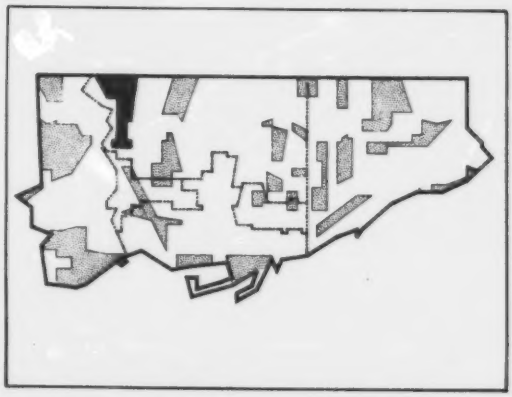
Number of Establishments		
Industry	575	32.0%
Retail	562	31.0
Office	612	34.0
Institutional	25	1.0
Recreation	7	1.0
Other	6	1.0
Total	1 787	100.0%

Number of Establishments by Size of Firm					
	Employees/Firm				
	1-9	10-99	100-499	500+	Total
Mfg./Whse.	186	302	69	6	563
Retail	132	66	6	0	204
Service	286	75	8	1	370
Office	404	184	21	3	612
Other	19	17	2	0	38
Total	1 027	644	106	10	1 787

Change in Number of Establishments 1981-1985	
Industry	-9
Retail	58
Office	113
Institutional	6
Recreation	1
Other	5
Total	174

INDUSTRIAL AREA 4: HIGHWAY 400 CORRIDOR





Key Map: Metropolitan Toronto

Table A1.5:
HIGHWAY 400 CORRIDOR INDUSTRIAL AREA STATISTICAL SUMMARY 1985

LAND USE

Land Use (ha)		
Industry	579	60.0%
Retail	111	11.5
Office	80	8.0
Institutional	54	6.0
Recreation	84	9.0
Open Space	13	1.0
Vacant	25	3.0
Other	15	1.5
Total	961	100.0%

Vacant Land (ha)	
Along Arterial Roads	11.423
Along Non-arterial Roads	13.303

Office Buildings	
Number	23
Site Area (ha)	48.85
G.F.A. (m^2)	210 974
Office F.A. (m^2)	107 606
Office Employment	3 722
Other Employment	815
Total Employment	4 537

FLOOR SPACE

Gross Floor Area (m^2)		
Industry	1 933 239	70.0%
Retail	378 703	14.0
Office	293 563	11.0
Institutional	108 782	4.0
Recreation	18 080	.5
Other	18 510	.5
Total	2 750 877	100.0%

Gross Floor Area by Type by Year Built			
	Unknown	Pre-1977	1977-1985
Industry		1 680 847	252 392
Retail	5 584	335 898	37 221
Office		251 092	42 471
Institutional		103 740	5 042
Recreation		16 000	2 080
Other		18 510	0
Total	5 584	2 406 087	339 206

EMPLOYMENT

Full-time Employment 1985		
Industry	21 928	54.0%
Retail	5 981	15.0
Office	10 676	26.0
Institutional	1 590	4.0
Recreation	91	-
Other	166	1.0
Total	40 432	100.0%

Full-time Employment by Road Type 1985		
	Arterial	Non-Arterial
Industry	3 447	18 481
Retail	1 806	4 175
Office	3 010	7 666
Institutional	938	632
Recreation	55	36
Other	113	51
Total	9 391	31 041

Full-time Employment by Parcel Code	
Industrial Employment	
- On Industrial Parcels	20 230
- On Non-industrial Parcels	1 698
Non-industrial Employment	
- On Industrial Parcels	7 205
- On Non-industrial Parcels	11 299

Full-time Employment by Size of Firm					
	Employees/Firm				
	1-9	10-99	100-499	500+	Total
Mfg./Whse.	1 785	11 217	8 241	508	21 751
Retail	800	1 429	764	0	2 993
Service	1 515	1 276	374	0	3 165
Office	2 168	3 870	3 460	1 178	10 676
Other	108	422	783	532	1 847
Total	6 376	18 214	13 624	2 218	40 432

Change in Full-time Employment 1981-1985	
Industry	843
Retail	-1 279
Office	-3 088
Institutional	-139
Recreation	-74
Other	136
Total	-3 601

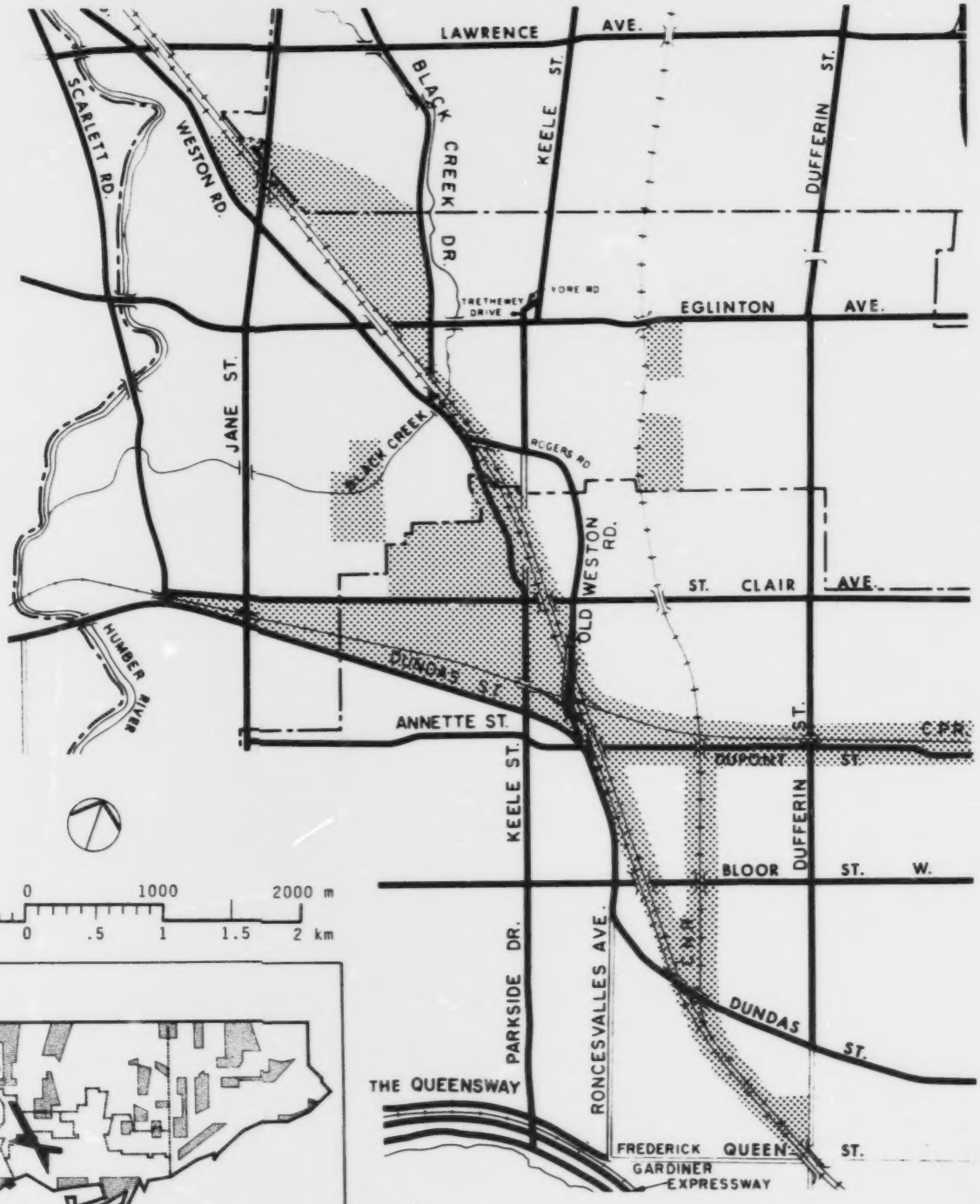
ESTABLISHMENTS

Number of Establishments		
Industry	864	35.0%
Retail	739	30.0
Office	800	32.0
Institutional	29	1.0
Recreation	18	1.0
Other	13	1.0
Total	2 463	100.0%

Number of Establishments by Size of Firm					
	Employees/Firm				
	1-9	10-99	100-499	500+	Total
Mfg./Whse.	429	377	50	1	837
Retail	213	61	5	0	279
Service	407	58	2	0	467
Office	616	163	17	2	800
Other	38	17	4	1	60
Total	1 703	678	78	4	2 463

Change in Number of Establishments 1981-1985	
Industry	139
Retail	134
Office	98
Institutional	13
Recreation	-1
Other	10
Total	393

INDUSTRIAL AREA 5: WESTON ROAD/JUNCTION



1000 0 1000 2000 m

1 0 .5 1 1.5 2 km

Key Map: Metropolitan Toronto

Table A1.6:
WESTON ROAD/JUNCTION INDUSTRIAL AREA STATISTICAL SUMMARY 1985

LAND USE

Land Use (ha)		
Industry	234	72.0%
Retail	53	15.0
Office	11	3.0
Institutional	11	3.0
Recreation	5	1.5
Open Space	4	1.0
Vacant	14	4.0
Other	1	.5
Total	333	100.0%

Vacant Land (ha)	
Along Arterial Roads	0.268
Along Non-arterial Roads	13.926

Office Buildings	
Number	15
Site Area (ha)	15.7
G.F.A. (m^2)	313 356
Office F.A. (m^2)	77 037
Office Employment	3 974
Other Employment	3 349
Total Employment	7 323

FLOOR SPACE

Gross Floor Area (m^2)		
Industry	1 507 952	72.0%
Retail	303 592	15.0
Office	194 709	9.0
Institutional	43 025	2.0
Recreation	8 708	-
Other	33 694	2.0
Total	2 093 680	100.0%

Gross Floor Area by Type by Year Built			
	Unknown	Pre-1977	1977-1985
Industry	103 806	1 281 234	122 892
Retail	20 478	254 968	28 146
Office	0	93 917	100 792
Institutional	0	35 783	7 240
Recreation	3 990	4 718	0
Other	928	5 620	29 146
Total	129 202	1 676 262	288 216

EMPLOYMENT

Full-time Employment 1985		
Industry	19 845	71.0%
Retail	2 715	10.0
Office	4 351	16.0
Institutional	361	1.0
Recreation	19	-
Other	561	2.0
Total	27 852	100.0%

Full-time Employment by Road Type 1985		
	Arterial	Non-Arterial
Industry	3 130	16 715
Retail	1 102	1 613
Office	522	3 829
Institutional	110	251
Recreation	2	17
Other	0	561
Total	4 866	22 986

Full-time Employment by Parcel Code	
Industrial Employment	
- On Industrial Parcels	17 433
- On Non-industrial Parcels	2 412
Non-industrial Employment	
- On Industrial Parcels	4 077
- On Non-industrial Parcels	3 930

Full-time Employment by Size of Firm					
	Employees/Firm				
	1-9	10-99	100-499	500+	Total
Mfg./Whse.	473	4 864	7 340	6 460	19 139
Retail	350	660	433	0	1 443
Service	614	349	200	613	1 976
Office	436	1 089	1 026	1 800	4 351
Other	66	340	0	535	941
Total	1 941	7 502	9 001	9 408	27 852

Change in Full-time Employment 1981-1985	
Industry	-6 423
Retail	-17
Office	1 616
Institutional	31
Recreation	-23
Other	561
Total	-4 253

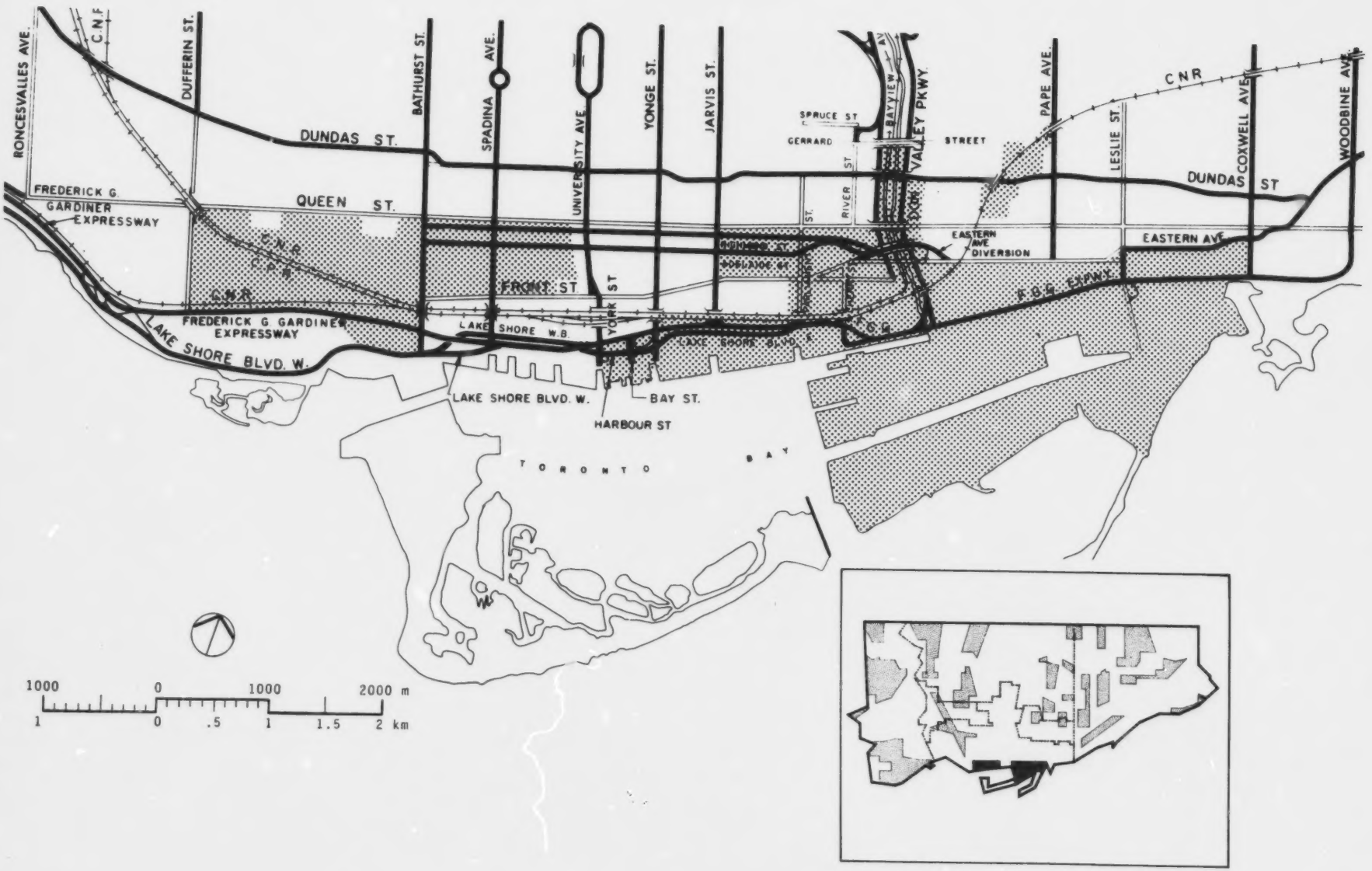
ESTABLISHMENTS

Number of Establishments		
Industry	325	33.0%
Retail	396	40.0
Office	238	24.0
Institutional	19	2.0
Recreation	7	.5
Other	6	.5
Total	991	100.0%

Number of Establishments by Size of Firm					
	Employees/Firm				
	1-9	10-99	100-499	500+	Total
Mfg./Whse.	135	141	37	7	320
Retail	124	25	3	0	152
Service	224	23	1	1	249
Office	192	39	6	1	238
Other	22	9	0	1	32
Total	697	237	47	10	991

Change in Number of Establishments 1981-1985	
Industry	62
Retail	63
Office	71
Institutional	5
Recreation	-23
Other	6
Total	184

INDUSTRIAL AREA 6: TORONTO CENTRAL AREA/WATERFRONT



Key Map: Metropolitan Toronto

Table A1.7:

TORONTO CENTRAL AREA/WATERFRONT INDUSTRIAL AREA STATISTICAL SUMMARY 1985

LAND USE

Land Use (ha)		
Industry	483	63.4%
Retail	73	9.7
Office	84	11.0
Institutional	10	1.2
Recreation	8	1.0
Open Space	59	8.0
Vacant	39	5.0
Other	5	.7
Total	761	100.0%

Vacant Land (ha)	
Along Arterial Roads	0.810
Along Non-arterial Roads	38.679

Office Buildings	
Number	77
Site Area (ha)	31.52
G.F.A. (m^2)	723 289
Office F.A. (m^2)	196 355
Office Employment	8 381
Other Employment	6 165
Total Employment	14 546

FLOOR SPACE

Gross Floor Area (m^2)		
Industry	2 042 988	47.0%
Retail	881 414	20.0
Office	1 162 040	27.0
Institutional	113 606	3.0
Recreation	19 740	-
Other	123 658	3.0
Total	4 343 446	100.0%

Gross Floor Area by Type by Year Built			
	Unknown	Pre-1977	1977-1985
Industry	277 954	1 723 473	41 361
Retail	85 212	770 286	25 916
Office	172 978	933 475	55 587
Institutional	1 354	112 252	0
Recreation	1 529	18 211	0
Other	18 881	61 303	43 274
Total	557 908	3 619 200	166 338

EMPLOYMENT

Full-time Employment 1985		
Industry	29 132	46.0%
Retail	9 012	14.0
Office	23 726	37.0
Institutional	1 430	2.0
Recreation	214	.5
Other	306	.5
Total	63 820	100.0%

Full-time Employment by Road Type 1985		
	Arterial	Non-Arterial
Industry	6 799	22 333
Retail	2 048	6 964
Office	6 509	17 217
Institutional	133	1 275
Recreation	34	180
Other	73	233
Total	15 618	100.0%

Full-time Employment by Parcel Code	
Industrial Employment	
- On Industrial Parcels	20 085
- On Non-industrial Parcels	9 047
Non-industrial Employment	
- On Industrial Parcels	6 042
- On Non-industrial Parcels	28 646

Full-time Employment by Size of Firm	Employees/Firm				
	1-9	10-99	100-499	500+	Total
Mfg./Whse.	2 020	10 755	10 575	4 922	28 272
Retail	1 867	1 817	782	0	4 466
Service	1 299	2 200	1 231	630	5 400
Office	4 183	8 096	4 272	7 175	23 726
Other	235	726	993	0	1 956
Total	9 604	23 594	17 873	12 747	63 820

Change in Full-time Employment 1981-1985	
Industry	-3 392
Retail	-186
Office	-3 060
Institutional	403
Recreation	64
Other	306
Total	-5 865

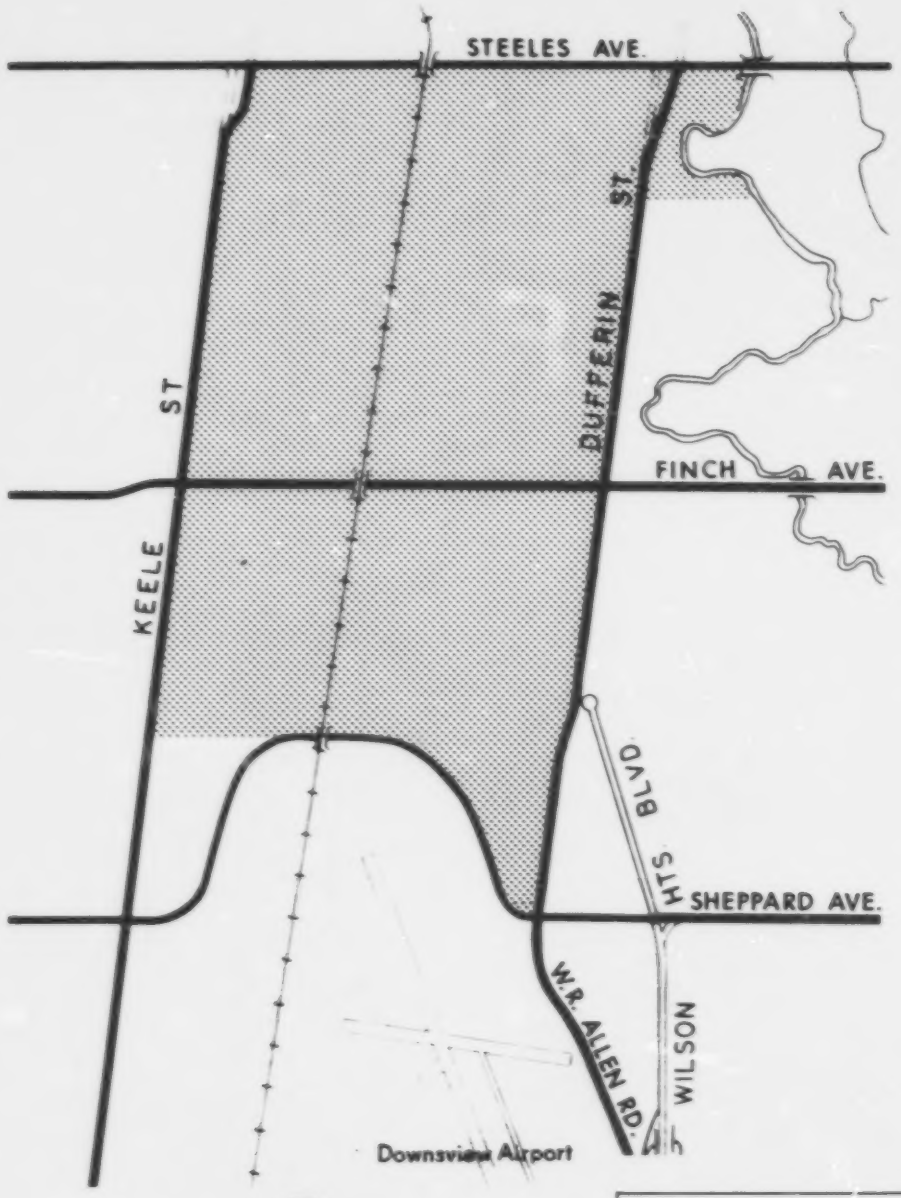
ESTABLISHMENTS

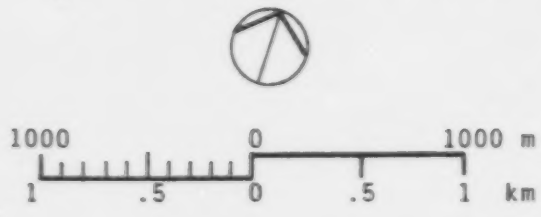
Number of Establishments		
Industry	1 004	24.0%
Retail	1 179	28.5
Office	1 869	45.0
Institutional	40	1.0
Recreation	46	1.0
Other	17	.5
Total	4 155	100.0%

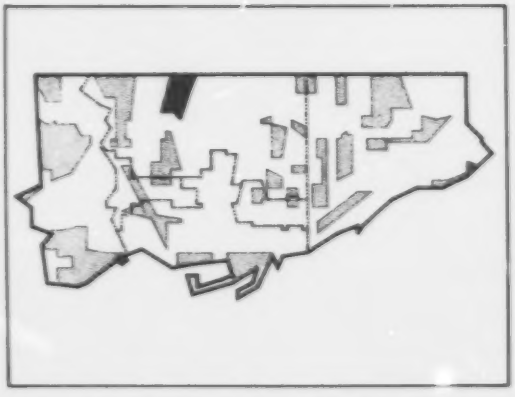
Number of Establishments by Size of Firm	Employees/Firm				
	1-9	10-99	100-499	500+	Total
Mfg./Whse.	361	353	52	6	972
Retail	634	84	4	0	722
Service	385	97	5	1	488
Office	1 538	298	25	8	1 869
Other	69	31	9	0	109
Total	3 187	863	90	15	4 155

Change in Number of Establishments 1981-1985	
Industry	158
Retail	223
Office	637
Institutional	-1
Recreation	18
Other	17
Total	1 072

INDUSTRIAL AREA 7: DUFFERIN/KEELE NORTH







Key Map: Metropolitan Toronto

Table A1.8:
DUFFERIN/KEELE NORTH INDUSTRIAL AREA STATISTICAL SUMMARY 1985

LAND USE

Land Use (ha)		
Industry	430	75.0%
Retail	55	10.0
Office	27	5.0
Institutional	15	3.0
Recreation	7	1.0
Open Space	0	-
Vacant	35	6.0
Other	0	-
Total	569	100.0%

Vacant Land (ha)	
Along Arterial Roads	9.002
Along Non-arterial Roads	25.808

Office Buildings	
Number	9
Site Area (ha)	20.06
G.F.A. (m^2)	82 291
Office F.A. (m^2)	45 495
Office Employment	2 052
Other Employment	354
Total Employment	2 406

FLOOR SPACE

Gross Floor Area (m^2)		
Industry	1 238 236	77.0%
Retail	212 828	13.0
Office	94 787	6.0
Institutional	20 732	1.0
Recreation	32 147	2.0
Other	6 998	1.0
Total	1 605 728	100.0%

Gross Floor Area by Type by Year Built			
	Unknown	Pre-1977	1977-1985
Industry	3 401	942 343	292 492
Retail		156 095	36 733
Office		81 384	13 403
Institutional		15 304	5 428
Recreation		32 147	0
Other		766	6 232
Total	3 401	1 228 039	374 288

EMPLOYMENT

Full-time Employment 1985		
Industry	16 202	51.0%
Retail	5 477	17.0
Office	8 749	27.0
Institutional	976	3.0
Recreation	107	1.0
Other	36	1.0
Total	31 547	100.0%

Full-time Employment by Road Type 1985		
	Arterial	Non-Arterial
Industry	2 140	14 062
Retail	1 694	3 783
Office	3 527	5 222
Institutional	872	104
Recreation	23	84
Other	17	19
Total	8 273	23 274

Full-time Employment by Parcel Code	
Industrial Employment	
- On Industrial Parcels	14 937
- On Non-industrial Parcels	1 265
Non-industrial Employment	
- On Industrial Parcels	7 999
- On Non-industrial Parcels	7 346

Full-time Employment by Size of Firm					
	Employees/Firm				
	1-9	10-99	100-499	500+	Total
Mfg./Whse.	1 406	8 212	6 211	0	15 829
Retail	1 044	1 769	695	0	3 508
Service	804	845	693	0	2 342
Office	2 146	4 769	1 034	800	8 749
Other	67	333	160	559	1 119
Total	5 467	15 928	8 793	1 359	31 547

Change in Full-time Employment 1981-1985	
Industry	604
Retail	115
Office	-1 370
Institutional	602
Recreation	-30
Other	-3
Total	-82

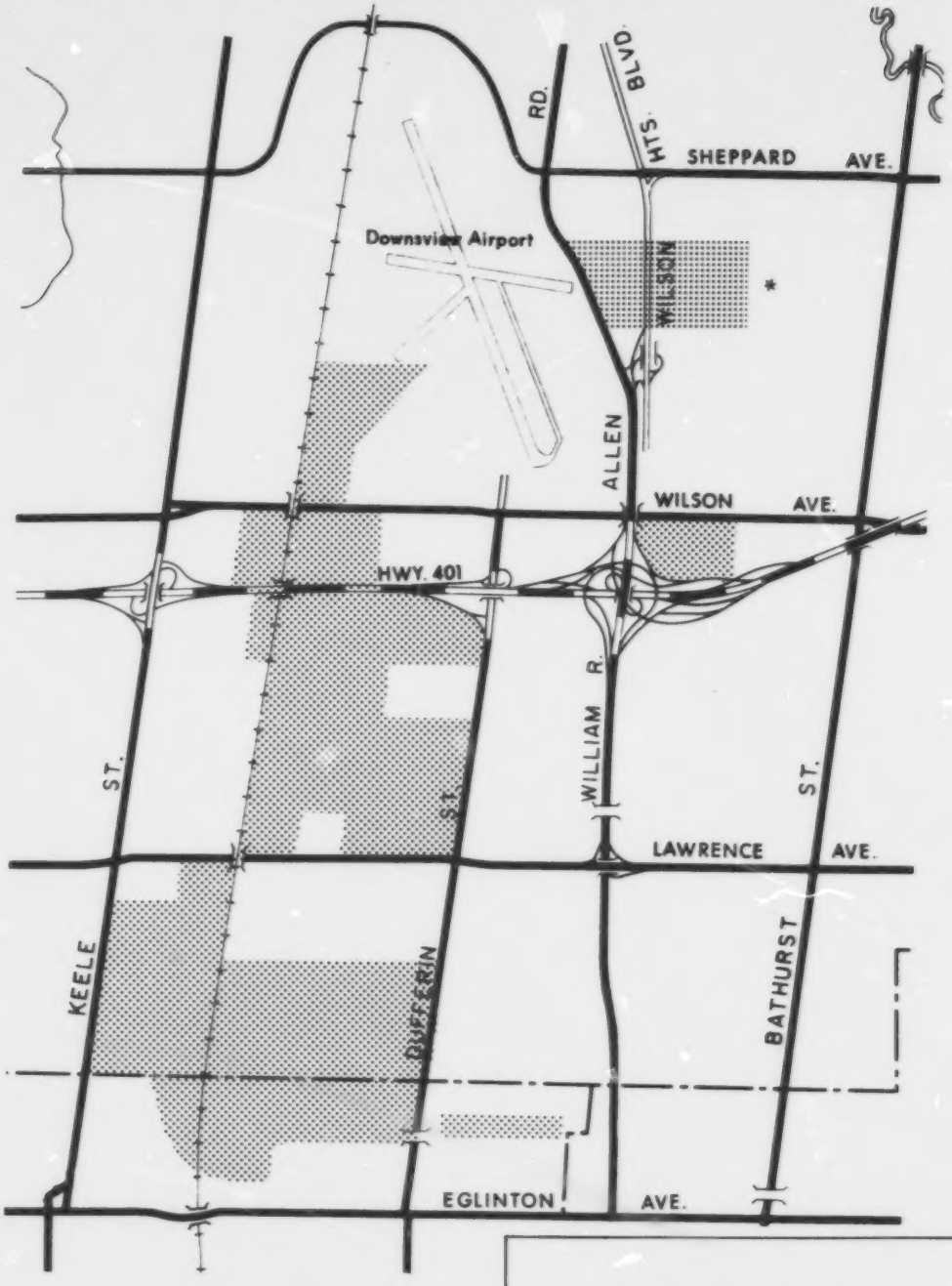
ESTABLISHMENTS

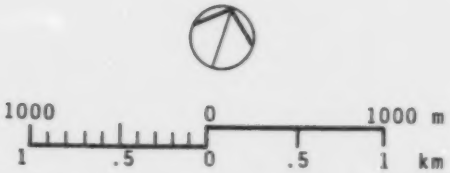
Number of Establishments		
Industry	687	31.0%
Retail	676	31.0
Office	810	37.0
Institutional	18	1.0
Recreation	8	-
Other	8	-
Total	2 207	100.0%

Number of Establishments by Size of Firm					
	Employees/Firm				
	1-9	10-99	100-499	500+	Total
Mfg./Whse.	362	276	38	0	676
Retail	318	80	4	0	402
Service	233	48	4	0	285
Office	606	196	7	1	810
Other	20	12	1	1	34
Total	1 539	612	54	2	2 207

Change in Number of Establishments 1981-1985	
Industry	69
Retail	85
Office	191
Institutional	5
Recreation	1
Other	6
Total	357

INDUSTRIAL AREA 8: DUFFERIN/KEELE SOUTH





* Has been redesignated Residential

Key Map: Metropolitan Toronto

Table A1.9:
DUFFERIN/KEELE SOUTH INDUSTRIAL AREA STATISTICAL SUMMARY 1985

LAND USE

Land Use (ha)		
Industry	272	62.0%
Retail	70	16.0
Office	20	5.0
Institutional	16	4.0
Recreation	3	.4
Open Space	2	.3
Vacant	51	12.0
Other	2	.3
Total	436	100.0%

Vacant Land (ha)	
Along Arterial Roads	9.706
Along Non-arterial Roads	41.482

Office Buildings	
Number	20
Site Area (ha)	20.73
G.F.A. (m^2)	90.396
Office F.A. (m^2)	46 661
Office Employment	2 133
Other Employment	93
Total Employment	2 231

FLOOR SPACE

Gross Floor Area (m^2)		
Industry	1 004 326	71.0%
Retail	270 426	19.0
Office	74 720	5.0
Institutional	44 853	3.0
Recreation	10 901	1.0
Other	8 219	1.0
Total	1 413 445	100.0%

Gross Floor Area by Type by Year Built			
	Unknown	Pre-1977	1977-1985
Industry	4 051	973 092	27 183
Retail		264 153	6 273
Office		65 708	9 012
Institutional		44 853	0
Recreation		10 901	0
Other		8 216	3
Total	4 051	1 366 923	42 471

EMPLOYMENT

Full-time Employment 1985		
Industry	19 855	66.0%
Retail	4 123	14.0
Office	4 941	16.0
Institutional	988	3.0
Recreation	133	.5
Other	109	.5
Total	30 149	100.0%

Full-time Employment by Road Type 1985		
	Arterial	Non-Arterial
Industry	5 787	14 068
Retail	1 233	2 890
Office	1 420	3 521
Institutional	798	190
Recreation	29	104
Other	6	103
Total	9 273	20 876

Full-time Employment by Parcel Code	
Industrial Employment	
- On Industrial Parcels	18 718
- On Non-industrial Parcels	1 137
Non-Industrial Employment	
- On Industrial Parcels	4 352
- On Non-industrial Parcels	5 942

Full-time Employment by Size of Firm					
	Employees/Firm				
	1-9	10-99	100-499	500+	Total
Mfg./Whse.	995	6 107	7 010	3 626	17 188
Retail	538	1 287	727	0	2 572
Service	349	770	480	2 339	4 138
Office	492	3 131	1 298	0	4 941
Other	34	478	0	778	1 290
Total	2 078	11 793	9 515	6 763	30 149

Change in Full-time Employment 1981-1985	
Industry	3 899
Retail	219
Office	-409
Institutional	-542
Recreation	73
Other	101
Total	3 341

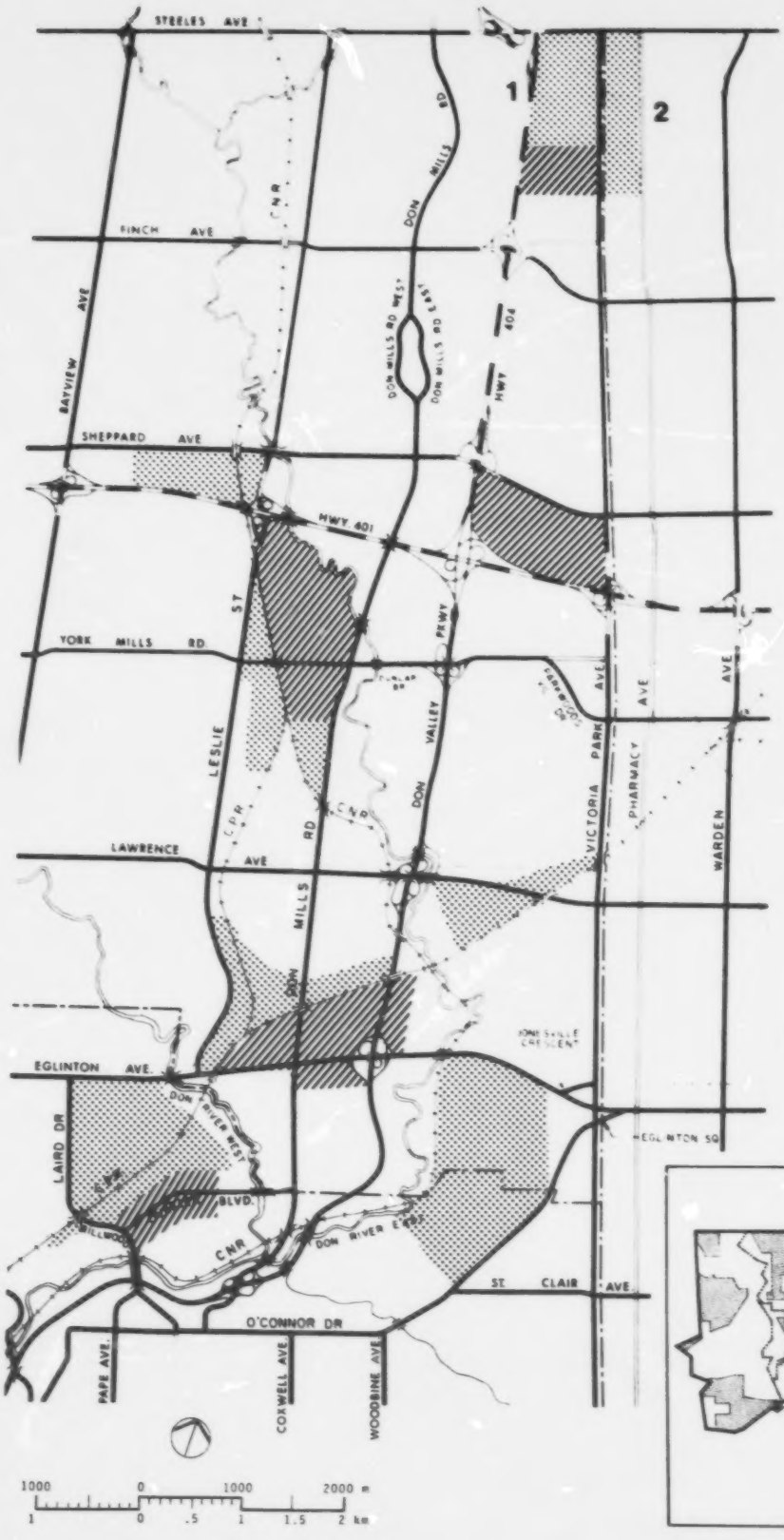
ESTABLISHMENTS

Number of Establishments		
Industry	321	33.0%
Retail	377	39.0
Office	250	26.0
Institutional	14	1.0
Recreation	7	1.0
Other	3	-
Total	972	100.0%

Number of Establishments by Size of Firm					
	Employees/Firm				
	1-9	10-99	100-499	500+	Total
Mfg./Whse.	96	178	34	2	310
Retail	146	50	6	0	202
Service	147	34	3	1	185
Office	134	107	9	0	250
Other	13	11	0	1	25
Total	536	380	32	4	972

Change in Number of Establishments 1981-1985	
Industry	29
Retail	61
Office	-26
Institutional	-2
Recreation	-1
Other	2
Total	63

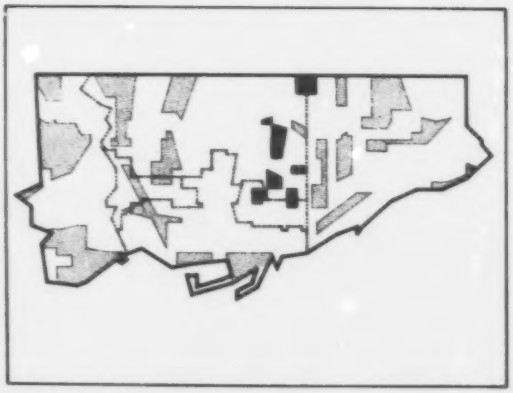
INDUSTRIAL AREA 9: DON VALLEY/HIGHWAY 404 CORRIDOR



1 North York has designated this a "Business Park"

2 Scarborough has designated this a "Business District"

Designated Office Parks



Key Map: Metropolitan Toronto

Table A1.10:

DON VALLEY/HIGHWAY 404 CORRIDOR INDUSTRIAL AREA STATISTICAL SUMMARY 1985

LAND USE

Land Use (ha)		
Industry	328	49.0%
Retail	61	9.0
Office	175	26.0
Institutional	10	2.0
Recreation	2	-
Open Space	72	11.0
Vacant	15	2.0
Other	7	1.0
Total	670	100.0%

Vacant Land (ha)	
Along Arterial Roads	4.217
Along Non-arterial Roads	11.204

Office Buildings	
Number	47
Site Area (ha)	105.77
G.F.A. (m^2)	328 397
Office F.A. (m^2)	253 942
Office Employment	7 789
Other Employment	969
Total Employment	8 758

FLOOR SPACE

Gross Floor Area (m^2)		
Industry	1 034 876	37.0%
Retail	175 072	10.0
Office	517 862	29.0
Institutional	28 072	2.0
Recreation	6 688	-
Other	44 886	2.0
Total	1 807 456	100.0%

Gross Floor Area by Type by Year Built	Unknown	Pre-1977	1977-1985
Industry		948 155	86 721
Retail		163 009	12 063
Office		394 639	123 223
Institutional		28 072	0
Recreation		4 886	1 802
Other		22 218	22 668
Total		1 560 979	246 477

EMPLOYMENT

Full-time Employment 1985		
Industry	19 016	49.0%
Retail	4 900	13.0
Office	14 123	37.0
Institutional	414	1.0
Recreation	31	-
Other	96	-
Total	38 580	100.0%

Full-time Employment by Road Type 1985	Arterial	Non-Arterial
Industry	5 634	13 382
Retail	1 986	2 914
Office	4 707	9 416
Institutional	140	274
Recreation	24	7
Other	42	54
Total	12 533	26 047

Full-time Employment by Parcel Code	
Industrial Employment	
- On Industrial Parcels	17 431
- On Non-industrial Parcels	1 585
Non-industrial Employment	
- On Industrial Parcels	6 691
- On Non-industrial Parcels	12 873

Full-time Employment by Size of Firm	Employees/Firm				
	1-9	10-99	100-499	500+	Total
Mfg./Whse.	539	4 573	8 367	5 482	18 963
Retail	363	1 671	433	0	2 491
Service	331	1 156	638	0	2 325
Office	1 229	5 814	3 880	3 200	14 123
Other	47	496	137	0	678
Total	2 711	13 710	13 477	8 682	38 580

Change in Full-time Employment 1981-1985	
Industry	-3 668
Retail	1 608
Office	-787
Institutional	28
Recreation	-22
Other	96
Total	-2 745

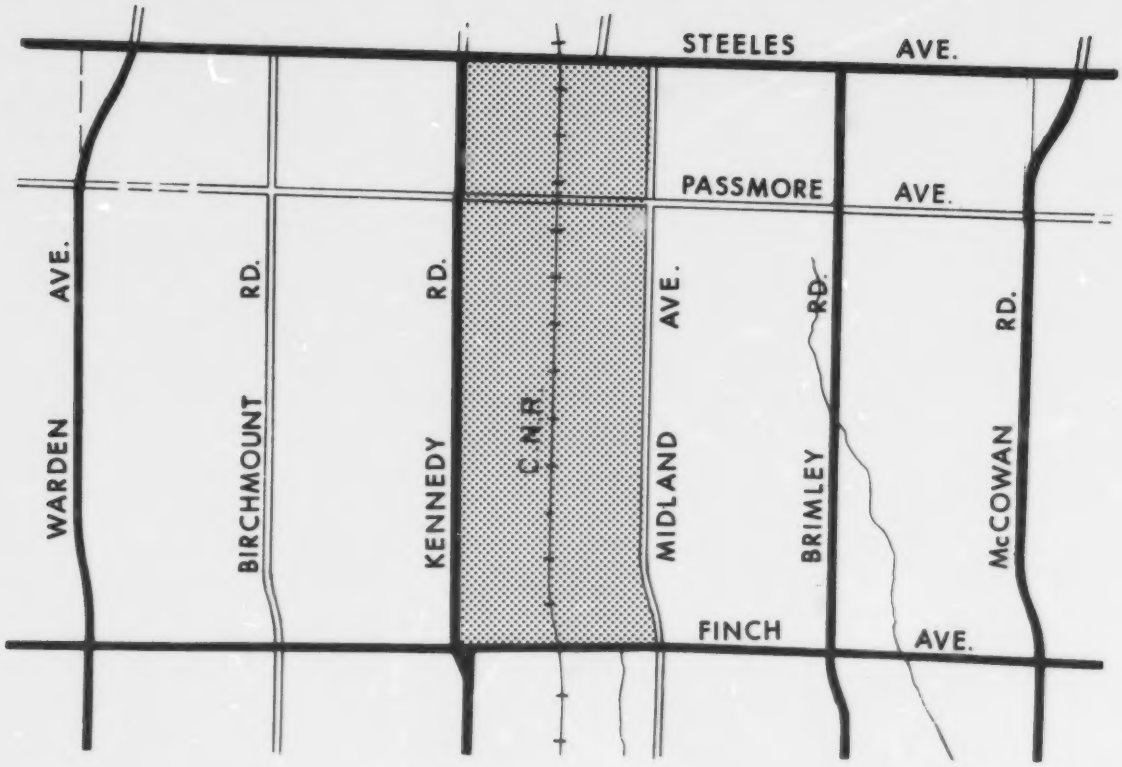
ESTABLISHMENTS

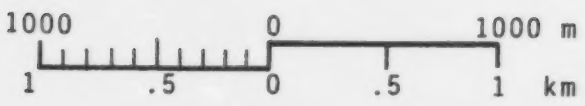
Number of Establishments		
Industry	333	26.0%
Retail	348	27.0
Office	574	45.0
Institutional	16	1.0
Recreation	3	.3
Other	6	.5
Total	1 280	100.0%

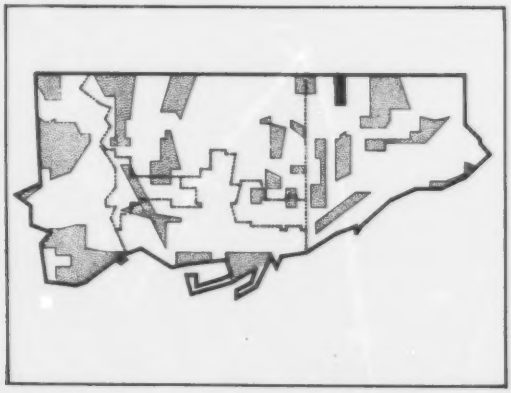
Number of Establishments by Size of Firm	Employees/Firm				
	1-9	10-99	100-499	500+	Total
Mfg./Whse.	134	139	50	7	330
Retail	110	56	4	0	170
Service	130	48	2	0	180
Office	337	192	21	4	574
Other	12	13	1	0	26
Total	743	448	78	11	1 280

Change in Number of Establishments 1981-1985	
Industry	30
Retail	122
Office	26
Institutional	-1
Recreation	-2
Other	6
Total	201

INDUSTRIAL AREA 10: MILLIKEN







Key Map: Metropolitan Toronto

Table A1.11:
MILLIKEN INDUSTRIAL AREA STATISTICAL SUMMARY 1985

LAND USE

Land Use (ha)		
Industry	66	41.0%
Retail	16	10.0
Office	21	13.0
Institutional	0	-
Recreation	0	-
Open Space	0	-
Vacant	58	36.0
Other	1	-
Total	162	100.0%

Vacant Land (ha)	
Along Arterial Roads	33.435
Along Non-arterial Roads	24.312

Office Buildings	
Number	4
Site Area (ha)	10.01
G.F.A. (m^2)	36 109
Office F.A. (m^2)	14 929
Office Employment	618
Other Employment	476
Total Employment	1 094

FLOOR SPACE

Gross Floor Area (m^2)		
Industry	114 796	79.0%
Retail	12 486	8.0
Office	12 792	9.0
Institutional	319	-
Recreation	0	-
Other	5 218	4.0
Total	145 611	100.0%

Gross Floor Area by Type by Year Built			
	Unknown	Pre-1977	1977-1985
Industry		42 791	72 005
Retail		8 989	3 497
Office		10 443	2 349
Institutional		319	0
Recreation		0	0
Other		1 013	4 205
Total		63 555	82 056

EMPLOYMENT

Full-time Employment 1985		
Industry	2 492	54.0%
Retail	664	14.0
Office	1 496	32.0
Institutional	3	-
Recreation	0	-
Other	1	-
Total	4 636	100.0%

Full-time Employment by Road Type 1985		
	Arterial	Non-Arterial
Industry	677	1 815
Retail	382	282
Office	791	703
Institutional	3	0
Recreation	0	0
Other	1	0
Total	1 854	2 802

Full-time Employment by Parcel Code	
Industrial Employment	
- On Industrial Parcels	1 582
- On Non-industrial Parcels	910
Non-industrial Employment	
- On Industrial Parcels	987
- On Non-industrial Parcels	1 177

Full-time Employment by Size of Firm					
	Employees/Firm				
	1-9	10-99	100-499	500+	Total
Mfg./Whse.	234	1 045	260	585	2 124
Retail	137	194	0	0	331
Service	204	149	348	0	701
Office	401	826	269	0	1 496
Other	4	0	0	0	4
Total	980	2 214	877	585	4 636

Change in Full-time Employment 1981-1985	
Industry	1 512
Retail	99
Office	-67
Institutional	2
Recreation	0
Other	-16
Total	1 530

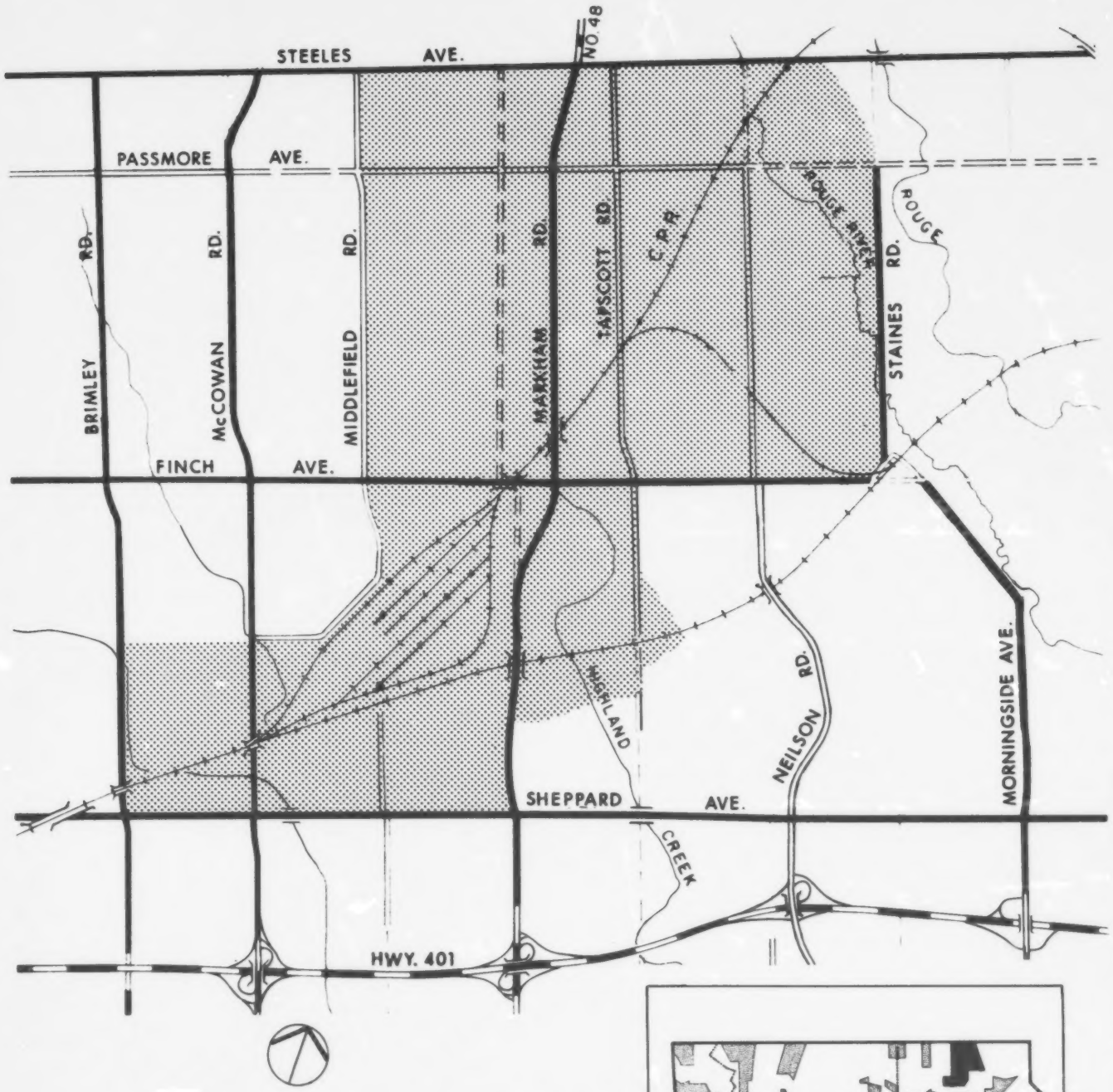
ESTABLISHMENTS

Number of Establishments		
Industry	104	28.0%
Retail	110	30.0
Office	150	41.0
Institutional	2	.5
Recreation	0	-
Other	1	.5
Total	367	100.0%

Number of Establishments by Size of Firm					
	Employees/Firm				
	1-9	10-99	100-499	500+	Total
Mfg./Whse.	63	33	2	1	101
Retail	40	9	0	0	49
Service	55	7	2	0	64
Office	119	29	2	0	150
Other	3	0	0	0	3
Total	282	78	6	1	367

Change in Number of Establishments 1981-1985	
Industry	67
Retail	70
Office	94
Institutional	1
Recreation	0
Other	0
Total	232

INDUSTRIAL AREA 11: TAPSCOTT/MARSHALLING YARD



Key Map: Metropolitan Toronto

Table A1.12:

TAPSCOTT/MARSHALLING YARD INDUSTRIAL AREA STATISTICAL SUMMARY 1985

LAND USE

Land Use (ha)		
Industry	334	30.0%
Retail	56	5.0
Office	37	3.0
Institutional	2	-
Recreation	77	7.0
Open Space	8	1.0
Vacant	398	32.0
Other	26	2.0
Total	1 138	100.0%

Vacant Land (ha)	
Along Arterial Roads	303.736
Along Non-arterial Roads	292.200

Office Buildings	
Number	13
Site Area (ha)	44.69
G.F.A. (m^2)	98 974
Office F.A. (m^2)	79 939
Office Employment	1 343
Other Employment	804
Total Employment	2 147

FLOOR SPACE

Gross Floor Area (m^2)		
Industry	625 960	77.0%
Retail	64 066	8.0
Office	94 923	12.0
Institutional	596	-
Recreation	4 138	-
Other	22 487	3.0
Total	812 172	100.0%

Gross Floor Area by Type by Year Built			
	Unknown	Pre-1977	1977-1985
Industry		225 097	400 863
Retail		23 648	40 418
Office		31 912	63 013
Institutional		156	440
Recreation		4 138	0
Other		10 874	11 613
Total		295 825	516 347

EMPLOYMENT

Full-time Employment 1985		
Industry	7 413	50.0%
Retail	2 730	19.0
Office	4 378	30.0
Institutional	41	-
Recreation	21	-
Other	108	1.0
Total	14 691	100.0%

Full-time Employment by Road Type 1985		
	Arterial	Non-Arterial
Industry	884	6 529
Retail	1 024	1 706
Office	1 194	3 184
Institutional	20	21
Recreation	2	19
Other	21	87
Total	3 145	11 546

Full-time Employment by Parcel Code	
Industrial Employment	
- On Industrial Parcels	7 140
- On Non-industrial Parcels	273
Non-industrial Employment	
- On Industrial Parcels	4 360
- On Non-industrial Parcels	2 718

Full-time Employment by Size of Firm					
	Employees/Firm				
	1-9	10-99	100-499	500+	Total
Mfg./Whse.	603	3 187	3 414	0	7 204
Retail	283	994	150	0	1 427
Service	378	738	396	0	1 512
Office	802	2 601	975	0	4 378
Other	62	108	0	0	170
Total	2 128	7 628	4 935	0	14 691

Change in Full-time Employment 1981-1985	
Industry	1 788
Retail	971
Office	1 657
Institutional	16
Recreation	4
Other	108
Total	4 544

ESTABLISHMENTS

Number of Establishments		
Industry	290	33.0%
Retail	241	27.0
Office	308	35.0
Institutional	3	.5
Recreation	4	.5
Other	33	4.0
Total	879	100.0%

Number of Establishments by Size of Firm					
	Employees/Firm				
	1-9	10-99	100-499	500+	Total
Mfg./Whse.	161	99	22	0	282
Retail	77	29	1	0	107
Service	103	34	3	0	142
Office	199	104	5	0	308
Other	33	7	0	0	40
Total	573	273	31	0	879

Change in Number of Establishments 1981-1985	
Industry	87
Retail	98
Office	81
Institutional	-1
Recreation	1
Other	33
Total	299

INDUSTRIAL AREA 12: SCARBOROUGH/HIGHWAY 401 CORRIDOR

Key Map: Metropolitan Toronto

Table A1.13:

SCARBOROUGH/401 CORRIDOR INDUSTRIAL AREA STATISTICAL SUMMARY 1985

LAND USE

Land Use (ha)		
Industry	386	61.0%
Retail	36	6.0
Office	63	10.0
Institutional	8	1.0
Recreation	6	1.0
Open Space	12	2.0
Vacant	116	18.0
Other	3	1.0
Total	630	100.0%

Vacant Land (ha)	
Along Arterial Roads	43.605
Along Non-Arterial Roads	72.668

Office Buildings	
Number	30
Site Area (ha)	89.13
G.F.A. (m^2)	198 536
Office F.A. (m^2)	136 837
Office Employment	6 189
Other Employment	1 308
Total Employment	7 497

FLOOR SPACE

Gross Floor Area (m^2)		
Industry	730 468	78.0%
Retail	69 193	7.2
Office	117 520	12.3
Institutional	9 007	1.0
Recreation	3 610	.5
Other	9 192	1.0
Total	938 990	100.0%

Gross Floor Area by Type by Year Built	Unknown	Pre-1977	1977-1985
Industry		627 615	122 853
Retail		54 456	14 737
Office		72 871	44 649
Institutional		9 007	0
Recreation		1 336	2 274
Other		9 192	0
Total		774 477	184 513

EMPLOYMENT

Full-time Employment 1985		
Industry	10 975	46.0%
Retail	3 228	14.0
Office	9 394	39.0
Institutional	219	1.0
Recreation	46	-
Other	37	-
Total	23 899	100.0%

Full-time Employment by Road Type 1985	Arterial	Non-Arterial
Industry	2 176	8 799
Retail	1 186	2 042
Office	2 286	7 108
Institutional	43	176
Recreation	24	22
Other	4	33
Total	5 719	18 180

Full-time Employment by Parcel Code	
Industrial Employment	
- On Industrial Parcels	10 889
- On Non-industrial Parcels	86
Non-industrial Employment	
- On Industrial Parcels	8 037
- On Non-industrial Parcels	4 867

Full-time Employment by Size of Firm	Employees/Firm				
	1-9	10-99	100-499	500+	Total
Mfg./Whse.	860	5 196	4 111	705	10 872
Retail	463	1 056	0	0	1 519
Service	449	958	405	0	1 812
Office	1 190	3 515	2 615	2 074	9 394
Other	64	238	0	0	302
Total	3 026	10 963	7 131	2 779	23 899

Change in Full-time Employment 1981-1985	
Industry	1 051
Retail	615
Office	-10
Institutional	132
Recreation	26
Other	36
Total	1 850

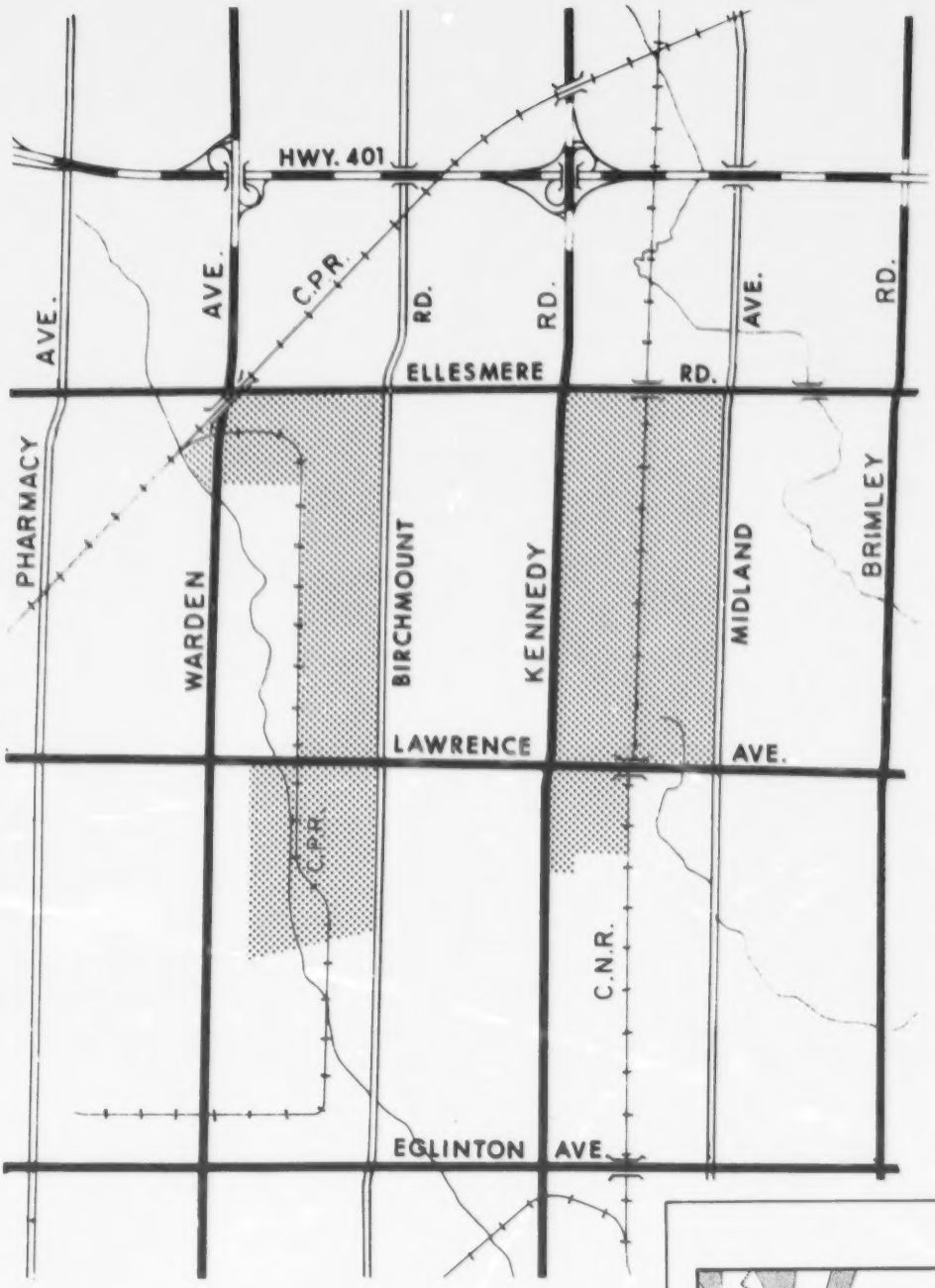
ESTABLISHMENTS

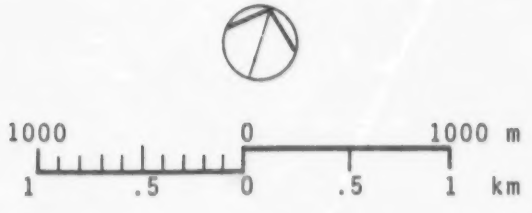
Number of Establishments		
Industry	390	32.0%
Retail	308	25.5
Office	478	39.5
Institutionl	19	2.0
Recreation	7	.5
Other	5	.5
Total	1 207	100.0%

Number of Establishments by Size of Firm	Employees/Firm				
	1-9	10-99	100-499	500+	Total
Mfg./Whse.	182	180	22	1	385
Retail	111	48	0	0	159
Service	108	44	2	0	154
Office	309	154	12	3	478
Other	19	12	0	0	31
Total	729	438	36	4	1 207

Change in Number of Establishments 1981-1985	
Industry	22
Retail	-7
Office	-10
Institutional	0
Recreation	1
Other	1
Total	7

INDUSTRIAL AREA 13: WEST-CENTRAL SCARBOROUGH





Key Map: Metropolitan Toronto

Table A1.14:
WEST-CENTRAL SCARBOROUGH INDUSTRIAL AREA STATISTICAL SUMMARY 1985

LAND USE

Land Use (ha)		
Industry	225	80.3%
Retail	28	10.0
Office	12	4.3
Institutional	1	.4
Recreation	3	1.0
Open Space	0	-
Vacant	9	3.0
Other	2	1.0
Total	**280**	**100.0%**

Vacant Land (ha)	
Along Arterial Roads	0.603
Along Non-arterial Roads	8.074

Office Buildings	
Number	9
Site Area (ha)	19.63
G.F.A. (m^2)	34 073
Office F.A. (m^2)	25 112
Office Employment	681
Other Employment	158
Total Employment	839

FLOOR SPACE

Gross Floor Area (m^2)		
Industry	665 838	86.0%
Retail	77 795	10.0
Office	23 045	3.0
Institutional	489	-
Recreation	3 681	1.0
Other	592	-
Total	**773 460**	**100.0%**

Gross Floor Area by Type by Year Built			
	Unknown	Pre-1977	1977-1985
Industry	0	636 020	9 838
Retail	0	68 093	9 702
Office	4 600	12 337	6 108
Institutional	0	489	0
Recreation	0	3 914	1 767
Other	0	592	0
Total	**4 600**	**741 443**	**27 413**

EMPLOYMENT

Full-time Employment 1985		
Industry	10 749	67.0%
Retail	2 003	12.0
Office	3 218	20.0
Institutional	117	1.0
Recreation	33	-
Other	20	-
Total	**16 142**	**100.0%**

Full-time Employment by Road Type 1985		
	Arterial	Non-Arterial
Industry	2 072	8 677
Retail	887	1 118
Office	658	2 560
Institutional	45	72
Recreation	20	13
Other	20	0
Total	**3 702**	**12 440**

Full-time Employment by Parcel Code	
Industrial Employment	
- On Industrial Parcels	10 681
- On Non-industrial Parcels	68
Non-industrial Employment	
- On Industrial Parcels	3 335
- On Non-industrial Parcels	2 058

Full-time Employment by Size of Firm	Employees/Firm				
	1-9	10-99	100-499	500+	Total
Mfg./Whse.	545	4 034	4 587	1 550	10 716
Retail	348	805	0	0	1 153
Service	425	460	0	0	885
Office	428	1 433	1 357	0	3 218
Other	33	137	0	0	170
Total	**1 779**	**6 869**	**5 944**	**1 550**	**16 142**

Change in Full-time Employment 1981-1985	
Industry	1 173
Retail	-334
Office	-535
Institutional	40
Recreation	0
Other	20
Total	**364**

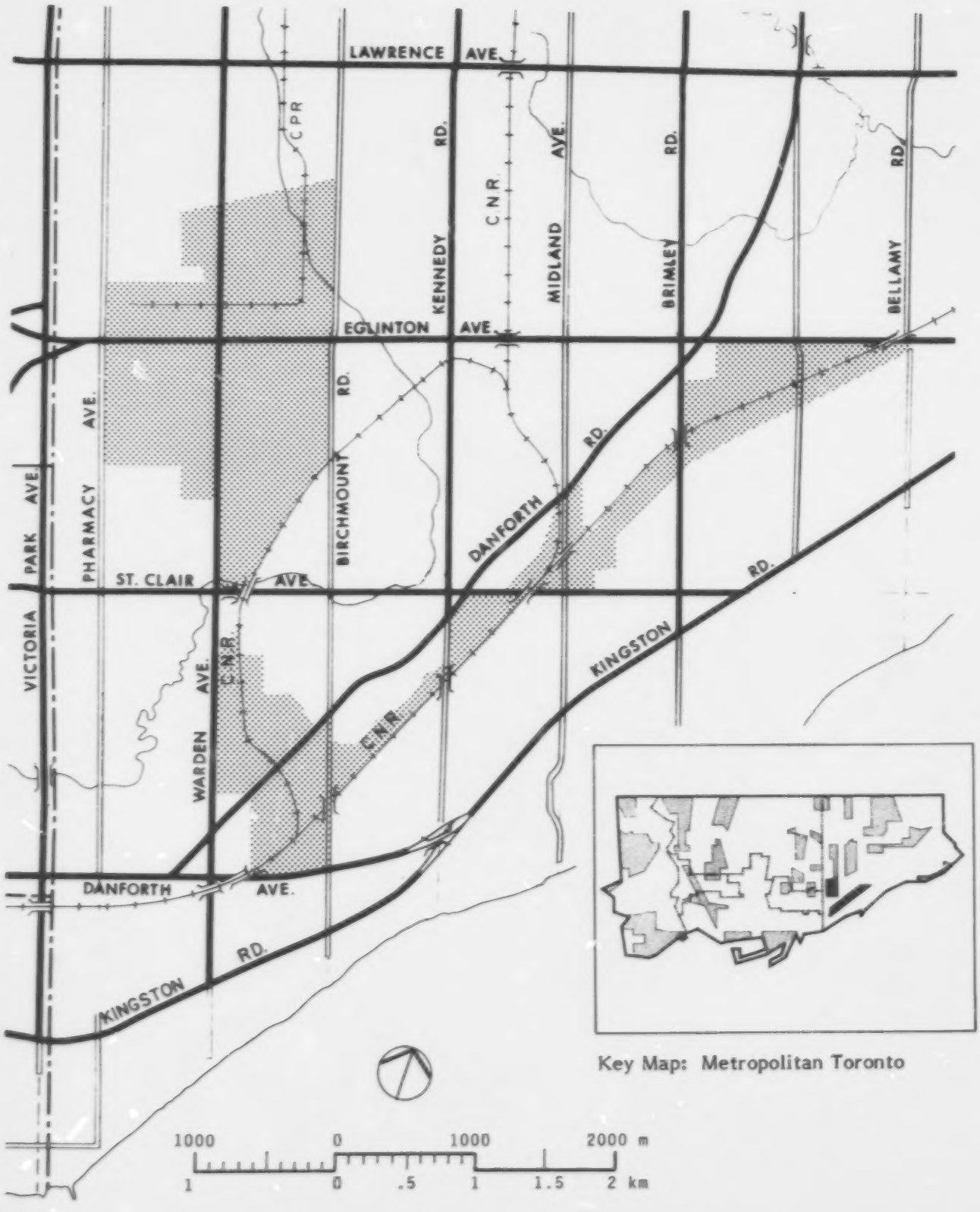
ESTABLISHMENTS

Number of Establishments		
Industry	298	41.0%
Retail	245	33.5
Office	173	23.5
Institutional	8	1.0
Recreation	5	1.0
Other	1	-
Total	**730**	**100.0%**

Number of Establishments by Size of Firm	Employees/Firm				
	1-9	10-99	100-499	500+	Total
Mfg./Whse.	132	132	30	2	296
Retail	79	27	0	0	106
Service	113	26	0	0	141
Office	101	63	9	0	173
Other	8	6	0	0	14
Total	**433**	**254**	**39**	**2**	**730**

Change in Number of Establishments 1981-1985	
Industry	16
Retail	11
Office	12
Institutional	2
Recreation	-2
Other	1
Total	**40**

INDUSTRIAL AREA 14: SOUTH-WEST SCARBOROUGH



Key Map: Metropolitan Toronto

Table A1.15

SOUTH-WEST SCARBOROUGH INDUSTRIAL AREA STATISTICAL SUMMARY 1985

LAND USE

Land Use (ha)		
Industry	234	58.0%
Retail	75	17.0
Office	34	8.0
Institutional	22	5.0
Recreation	2	-
Open Space	12	3.0
Vacant	26	6.0
Other	11	3.0
Total	436	100.0%

Vacant Land (ha)	
Along Arterial Roads	16.026
Along Non-arterial Roads	10.238

Office Buildings	
Number	10
Site Area (ha)	38.5
G.F.A. (m^2)	138 219
Office F.A. (m^2)	124 138
Office Employment	4 207
Other Employment	132
Total Employment	4 339

FLOOR SPACE

Gross Floor Area (m^2)		
Industry	796 501	71.0%
Retail	196 788	17.5
Office	87 199	8.0
Institutional	35 126	3.0
Recreation	3 138	-
Other	8 287	.5
Total	1 125 039	100.0%

Gross Floor Area by Type by Year Built			
	Unknown	Pre-1977	1977-1983
Industry		776 081	18 420
Retail		152 126	44 662
Office		54 919	32 280
Institutional		35 126	0
Recreation		375	2 783
Other		8 026	261
Total		1 026 653	98 406

EMPLOYMENT

Full-time Employment 1985		
Industry	13 107	55.0%
Retail	2 452	10.0
Office	7 165	30.0
Institutional	1 227	5.0
Recreation	12	-
Other	25	-
Total	23 988	100.0%

Full-time Employment by Road Type 1985		
	Arterial	Non-Arterial
Industry	6 673	6 434
Retail	1 182	1 270
Office	4 648	2 517
Institutional	937	290
Recreation	4	8
Other	25	0
Total	13 469	10 519

Full-time Employment by Parcel Code	
Industrial Employment	
- On Industrial Parcels	12 603
- On Non-industrial Parcels	504
Non-industrial Employment	
- On Industrial Parcels	3 356
- On Non-industrial Parcels	7 525

Full-time Employment by Size of Firm					
	Employees/Firm				
	1-9	10-99	100-499	500+	Total
Mfg./Whse.	593	2 374	6 367	3 680	13 014
Retail	396	679	0	0	1 075
Service	363	777	130	0	1 470
Office	508	1 558	1 760	3 339	7 165
Other	28	189	347	700	1 264
Total	2 088	5 577	8 604	7 719	23 988

Change in Full-time Employment 1981-1985	
Industry	-4 065
Retail	736
Office	3 719
Institutional	194
Recreation	12
Other	22
Total	618

ESTABLISHMENTS

Number of Establishments		
Industry	275	31.5%
Retail	366	42.0
Office	216	25.0
Institutional	14	1.5
Recreation	3	-
Other	1	-
Total	873	100.0%

Number of Establishments by Size of Firm					
	Employees/Firm				
	1-9	10-99	100-499	500+	Total
Mfg./Whse.	157	79	30	3	269
Retail	129	22	0	0	131
Service	182	38	1	0	221
Office	140	64	9	3	216
Other	7	8	2	1	18
Total	615	211	42	7	873

Change in Number of Establishments 1981-1985	
Industry	-44
Retail	122
Office	14
Institutional	2
Recreation	3
Other	0
Total	97

INDUSTRIAL AREA 15: SOUTH-EAST SCARBOROUGH

1000 0 1000 m
1 .5 0 .5 1 km

Key Map: Metropolitan Toronto

Table A1.16:

SOUTH-EAST SCARBOROUGH INDUSTRIAL AREA STATISTICAL SUMMARY 1985

LAND USE

Land Use (ha)		
Industry	159	49.0%
Retail	0	-
Office	59	18.0
Institutional	0	-
Recreation	0	-
Open Space	73	22.0
Vacant	34	11.0
Other	0	-
Total	325	100.0%

Vacant Land (ha)	
Along Arterial Roads	0
Along Non-arterial Roads	34.213

Office Buildings	
Number	0
Site Area (ha)	-
G.F.A. (m^2)	-
Office F.A. (m^2)	-
Office Employment	-
Other Employment	-
Total Employment	-

FLOOR SPACE

Gross Floor Area (m^2)		
Industry	73 633	77.0%
Retail	186	-
Office	19 764	21.0
Institutional	0	-
Recreation	0	-
Other	2 178	2.0
Total	93 761	100.0%

Gross Floor Area by Type by Year Built	Unknown	Pre-1977	1977-1985
Industry		39 936	33 677
Retail		186	0
Office		19 764	0
Institutional		0	0
Recreation		0	0
Other		1 190	988
Total		61 096	34 665

EMPLOYMENT

Full-time Employment 1985		
Industry	1 316	93.0%
Retail	39	4.0
Office	32	2.0
Institutional	0	-
Recreation	4	.3
Other	6	.5
Total	1 417	100.0%

Full-time Employment by Road Type 1985	Arterial	Non-Arterial
Industry	0	1 316
Retail	2	37
Office	0	32
Institutional	0	0
Recreation	0	4
Other	0	6
Total	2	1 413

Full-time Employment by Parcel Code	
Industrial Employment	
- On Industrial Parcels	1 206
- On Non-industrial Parcels	110
Non-industrial Employment	
- On Industrial Parcels	99
- On Non-industrial Parcels	2

Full-time Employment by Size of Firm	Employees/Firm				
	1-9	10-99	100-499	500+	Total
Mfg./Whse.	87	643	476	0	1 206
Retail	7	0	0	0	7
Service	34	128	0	0	162
Office	32	0	0	0	32
Other	10	0	0	0	10
Total	170	773	476	0	1 417

Change in Full-time Employment 1981-1985	
Industry	493
Retail	-110
Office	-103
Institutional	0
Recreation	4
Other	6
Total	288

ESTABLISHMENTS

Number of Establishments		
Industry	54	71.0%
Retail	10	13.0
Office	10	13.0
Institutional	0	-
Recreation	1	1.3
Other	1	1.3
Total	76	100.0%

Number of Establishments by Size of Firm	Employees/Firm				
	1-9	10-99	100-499	500+	Total
Mfg./Whse.	26	21	4	0	51
Retail	2	0	0	0	2
Service	9	2	0	0	11
Office	10	0	0	0	10
Other	2	0	0	0	2
Total	49	23	4	0	76

Change in Number of Establishments 1981-1985	
Industry	-5
Retail	88
Office	40
Institutional	10
Recreation	4
Other	4
Total	101

Table A2:

CHANGE IN FULL-TIME EMPLOYMENT IN INDUSTRIAL AREAS IN METRO TORONTO 1981-1985

	Industry	Retail	Office	Institutional	Recreational	Other	Total
North-West Etobicoke	2 389	277	726	-13	-22	131	3 488
Rexdale	-1 230	1 035	-650	585	-36	504	208
Southern Etobicoke	-4 077	123	1 221	149	-12	221	-2 375
Highway 400 Corridor	843	-1 279	-3 088	-139	-74	136	-3 601
Weston Road/Junction	-6 423	-17	1 616	31	-23	561	-4 255
Toronto Central Area/Waterfront	-3 392	-186	-3 060	403	64	306	-5 865
Dufferin/Keele North	604	115	-1 370	602	-30	-3	-82
Dufferin/Keele South	3 899	219	-409	-542	73	101	3 341
Don Valley/Hwy. 404 Corridor	-3 668	1 608	-787	28	-22	96	-2 745
Milliken	1 512	99	-67	2	0	-16	1 530
Tapscott/Marshalling Yard	1 788	971	1 657	16	4	108	4 544
Scarborough/401 Corridor	1 051	615	-10	132	26	36	1 850
West-Central Scarborough	1 173	-334	-535	40	0	20	364
South-West Scarborough	-4 065	736	3 719	194	12	22	618
South-East Scarborough	493	-110	-145	0	4	6	248
Total Industrial Areas	**-9 103**	**3 872**	**-1 182**	**1 488**	**-36**	**2 229**	**-2 732**

Source: M.T.P.D.; E.L.A. 1981, 1985 Special Run 3.65

Table A3:

CHANGE IN NUMBER OF ESTABLISHMENTS IN INDUSTRIAL AREAS 1981-1985

	Industry	Retail	Office	Institutional	Recreational	Other	Total
North-West Etobicoke	75	39	13	-1	1	6	133
Rexdale	4	78	106	6	0	2	196
Southern Etobicoke	-9	58	113	6	1	5	174
Highway 400 Corridor	139	134	98	13	-1	10	393
Weston Road/Junction	62	63	71	5	-23	6	184
Toronto Central Area/Waterfront	158	223	657	-1	18	17	1 072
Dufferin/Keele North	69	85	191	5	1	6	357
Dufferin/Keele South	29	61	-26	-2	-1	2	63
Don Valley/Hwy. 404 Corridor	50	122	26	-1	-2	6	201
Milliken	67	70	94	1	0	0	232
Tapscott/Marshalling Yard	87	98	81	-1	1	33	299
Scarborough/401 Corridor	22	-7	-10	0	1	1	7
West-Central Scarborough	16	11	12	2	-2	1	40
South-West Scarborough	-44	122	14	2	3	0	97
South-East Scarborough	-5	88	40	10	4	4	141
Total Industrial Areas	**720**	**1 245**	**1 480**	**44**	**1**	**99**	**3 589**

Source: M.T.P.D.; E.L.A. 1981, 1985 Special Run 3.65

Table A4:

DISTRIBUTION OF FULL-TIME EMPLOYMENT IN INDUSTRIAL AREAS IN METRO TORONTO 1985

	Industry	Retail	Office	Institutional	Recreational	Other	Total
North-West Etobicoke	2.0%	2.0%	2.2%	.2%	1.6%	5.6%	2.0%
Rexdale	10.0%	8.4%	7.5%	18.4%	50.5%	21.5%	9.5%
Southern Etobicoke	13.7%	10.9%	9.8%	5.7%	1.1%	10.0%	12.0%
Highway 400 Corridor	9.5%	10.9%	9.3%	16.3%	6.0%	7.1%	9.7%
Weston Road/Junction	8.6%	4.9%	3.8%	3.7%	1.3%	24.0%	6.7%
Toronto Central Area/Waterfront	12.6%	16.4%	20.7%	14.7%	14.1%	13.1%	15.4%
Dufferin/Keele North	7.0%	9.9%	7.6%	10.0%	7.0%	1.5%	7.6%
Dufferin/Keele South	8.6%	7.5%	4.3%	10.1%	8.8%	4.7%	7.3%
Don Valley/404 Corridor	8.2%	8.9%	12.3%	4.2%	2.0%	4.1%	9.3%
Milliken	1.1%	1.2%	1.3%	.0%	.0%	.0%	1.1%
Tapscott/Marshalling Yard	3.2%	5.0%	3.8%	.4%	1.4%	4.6%	3.5%
Scarborough/401 Corridor	4.7%	5.9%	8.2%	2.2%	3.0%	1.6%	5.8%
West-Central Scarborough	4.6%	3.6%	2.8%	1.2%	2.2%	.9%	3.9%
South-West Scarborough	5.7%	4.5%	6.3%	12.6%	.8%	1.1%	5.8%
South-East Scarborough	.6%	.1%	.0%	.0%	.3%	.3%	.3%
Total Industrial Areas	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: M.T.P.D.; E.L.A. 1985, Special Run 3.65

Table A5:

GROSS FLOOR AREA IN INDUSTRIAL AREAS BY YEAR BUILT
(square metres)

	Year Unknown	Pre-1977	1977-1985	Total
North-West Etobicoke	0	448 067	201 795	649 862
Rexdale	0	2 193 420	141 017	2 334 437
Southern Etobicoke	929	3 002 192	217 898	3 221 019
Highway 400 Corridor	5 584	2 406 087	339 206	2 750 877
Weston Road/Junction	129 202	1 676 262	288 216	2 093 680
Toronto Central Area/Waterfront	557 908	3 619 200	166 338	4 343 446
Dufferin/Keele North	3 401	1 228 039	374 288	1 605 728
Dufferin/Keele South	4 051	1 366 923	42 471	1 413 445
Don Valley/404 Corridor	0	1 560 979	246 477	1 807 456
Milliken	0	63 555	82 056	145 611
Tapscott/Marshalling Yard	0	295 825	516 347	812 172
Scarborough/401 Corridor	0	774 477	184 513	958 990
West-Central Scarborough	4 600	741 445	27 415	773 460
South-West Scarborough	0	1 026 653	98 406	1 125 059
South-East Scarborough	0	61 096	34 665	95 761
Total Industrial Areas	**705 675**	**20 464 220**	**2 961 108**	**24 131 003**

Source: M.T.P.D.; E.L.A. 1985 Special Run 3.64

Table A6:

GROSS FLOOR SPACE BUILT BETWEEN 1977-1985 IN INDUSTRIAL AREAS

(square metres)

	Manufac-turing	Mixed Industrial/ Commercial	Warehouse	Other	Total Industry	Office	Retail	Institution	Recreation	Other	Total
North-West Etobicoke	65 678	29 975	35 666	3 806	135 125	44 364	22 306	0	0	0	201 795
Rexdale	49 517	13 087	28 387	1 010	92 001	44 040	4 976	0	0	0	141 017
Southern Etobicoke	131 869	7 860	19 767	15 094	174 590	28 810	13 932	566	0	0	217 898
Highway 400 Corridor	124 858	49 114	78 420	0	252 392	42 471	37 221	5 042	2 080	0	339 206
Weston Road/Junction	13 237	0	9 179	100 476	122 892	100 792	28 146	7 240	0	29 146	288 216
Toronto Central Area/Waterfront	16 362	0	1 509	23 690	41 561	55 587	25 916	0	0	43 274	166 338
Dufferin/Keele North	90 985	167 070	13 784	20 653	292 492	13 403	56 733	5 428	0	6 232	374 288
Dufferin/Keele South	22 769	0	512	3 902	27 183	9 012	6 273	0	0	3	42 471
Don Valley/404 Corridor	6 034	58 607	21 087	993	86 721	123 223	12 063	0	1 802	22 668	246 477
Milliken	26 026	39 199	5 816	964	72 005	2 349	3 497	0	0	4 205	82 056
Tapscott/Marshalling Yard	78 323	196 648	104 340	21 552	400 863	63 013	40 418	440	0	11 613	516 347
Scarborough/401 Corridor	41 363	32 009	48 111	1 370	122 853	44 649	14 737	0	2 274	0	184 513
West-Central Scarborough	423	5 617	3 798	0	9 838	6 108	9 702	0	1 767	0	27 415
South-West Scarborough	13 491	3 449	1 296	184	18 420	32 280	44 662	0	2 783	261	98 406
South-East Scarborough	13 877	3 611	0	16 189	33 677	0	0	0	0	988	34 665
Total Industrial Areas	**694 812**	**606 246**	**371 672**	**209 883**	**1 882 613**	**610 101**	**320 582**	**18 716**	**10 706**	**118 390**	**2 961 108**

Source: M.T.P.D.; E.L.A. 1985 Special Run 3.64

Table A7:

FULL-TIME EMPLOYMENT IN INDUSTRIAL AREAS BY ARTERIAL/NON-ARTERIAL ROADS 1985

		Industry	Office	Retail	Institutional	Recreation	Other	Total
North-West Etobicoke	arterial	487	279	413	0	11	0	1 190
	non-arterial	4 049	2 187	686	23	13	131	7 089
Rexdale	arterial	4 121	1 325	1 812	256	758	504	8 776
	non-arterial	19 085	7 236	2 826	1 541	10	0	30 698
Southern Etobicoke	arterial	8 265	3 440	2 139	104	4	0	13 932
	non-arterial	23 470	7 807	3 860	432	13	233	35 835
Highway 400 Corridor	arterial	3 447	3 010	1 806	958	55	115	9 391
	non-arterial	18 481	7 666	4 175	632	36	51	31 041
Weston Road/ Junction	arterial	3 130	522	1 102	110	2	0	4 866
	non-arterial	16 715	3 829	1 613	231	17	561	22 986
Toronto Central Area/Waterfront	arterial	6 799	6 509	2 048	135	34	73	15 618
	non-arterial	22 333	17 217	6 964	1 273	180	233	48 202
Dufferin/Keele North	arterial	2 140	3 527	1 694	872	23	17	8 273
	non-arterial	14 062	5 222	3 783	104	84	19	23 274
Dufferin/Keele South	arterial	5 787	1 420	1 233	798	29	6	9 273
	non-arterial	14 068	3 521	2 890	190	104	103	20 876
Don Valley/ 404 Corridor	arterial	5 634	4 707	1 986	140	24	42	12 533
	non-arterial	13 382	9 416	2 914	274	7	54	26 047
Milliken	arterial	677	791	382	3	0	1	1 854
	non-arterial	1 815	705	282	0	0	0	2 802
Tapscott/ Marshalling Yard	arterial	884	1 194	1 024	20	2	21	3 145
	non-arterial	6 329	3 184	1 706	21	19	87	11 546
Scarborough/ 401 Corridor	arterial	2 176	2 286	1 186	43	24	4	5 719
	non-arterial	8 799	7 108	2 042	176	22	33	18 180
West-Central Scarborough	arterial	2 072	658	887	43	20	20	3 702
	non-arterial	8 677	2 560	1 118	72	13	0	12 440
South-West Scarborough	arterial	6 673	4 648	1 182	937	4	25	13 469
	non-arterial	6 434	2 517	1 270	290	8	0	10 519
South-East Scarborough	arterial	0	0	2	0	0	0	2
	non-arterial	1 316	32	37	0	4	6	1 415
Total Industrial Areas	**arterial**	**52 272**	**34 316**	**18 896**	**4 441**	**990**	**828**	**111 743**
	non-arterial	**179 213**	**80 207**	**36 186**	**5 301**	**330**	**1 511**	**302 950**

Source: M.T.P.D.; E.L.A. 1985 Special Run 3.65

Table A8:

DISTRIBUTION OF LAND USE IN INDUSTRIAL AREAS

Land Use	North-West Etobicoke	Rexdale	Southern Etobicoke	Highway 400 Corridor	Weston Road/ Junction	Toronto Central Area/Waterfront	Dufferin/Keele North
Industry							
. General Manufacturing	1.5%	12.8%	15.8%	12.1%	6.7%	5.4%	4.7%
. Warehouse	6.9	16.3	11.3	16.8	3.3	6.2	4.7
. Transportation/Communications	8.2	7.5	23.2	3.6	8.0	20.4	1.3
. Mixed Industrial/Commercial	9.7	3.9	4.6	11.6	.0	.9	20.0
. Sewer/Water/Refuse/Maintenance	.5	13.4	3.3	4.2	.7	23.4	8.7
. Open Storage	.5	1.4	22.6	19.0	2.0	12.4	2.6
. Storage Tanks	.0	.0	2.0	.0	1.3	21.5	70.2
. Heavy Industry	3.1	19.2	23.9	2.7	.7	17.3	.4
. Research and Development	.0	31.4	.0	3.2	1.9	.0	.0
Office	5.7	15.1	10.5	8.8	1.2	9.2	3.0
Retail	2.3	9.8	13.3	13.1	6.4	8.7	6.7
Institutional	.2	21.0	11.1	24.3	5.1	4.6	6.8
Recreation	1.2	6.2	1.7	39.0	2.4	3.8	3.0
Open Space	9.9	12.8	4.0	3.8	1.0	17.0	.0
Vacant Land	17.1	8.2	1.4	1.8	1.0	2.8	2.5
Accommodation	.0	33.0	.9	7.8	.0	4.1	.0
Other	.0	5.7	11.4	17.0	1.1	5.7	.0
Total Site Area	**5.9%**	**11.2%**	**10.9%**	**10.3%**	**3.8%**	**8.1%**	**6.1%**

Source: M.T.P.D.; E.L.A. 1985 Special Run 3.64

Dufferin/Keele South	Don Valley/ 404 Corridor	Milliken	Tapscott/ Marshalling Yard	Scarborough/ 401 Corridor	West-Central Scarborough	South-West Scarborough	South-East Scarborough	Total
4.6%	6.1%	1.6%	5.3%	7.4%	6.5%	6.5%	2.8%	100.0%
8.2	7.3	.2	6.7	7.1	2.4	2.6	.0	100.0%
5.1	7.3	.9	2.3	6.5	.8	4.0	.8	100.0%
2.7	6.7	2.4	16.0	12.1	5.2	3.3	.9	100.0%
8.8	2.5	.0	2.1	4.5	2.6	.9	24.5	100.0%
1.1	.4	2.9	25.6	7.9	.0	1.7	.0	100.0%
.0	.2	.0	3.1	1.5	.0	.2	.0	100.0%
2.8	14.2	.0	.0	.2	.0	15.4	.0	100.0%
38.3	14.6	.0	.0	2.5	8.1	.0	.0	100.0%
2.2	19.2	2.3	4.1	7.0	1.4	3.8	6.3	100.0%
8.0	6.7	2.0	6.8	3.6	3.5	9.0	.1	100.0%
7.1	4.6	0.1	1.1	3.8	.3	10.0	.0	100.0%
1.2	.7	.0	35.6	2.9	1.3	.9	.0	100.0%
.7	20.7	.0	2.3	3.6	.0	3.5	20.8	100.0%
3.7	1.0	4.1	43.0	8.4	.6	1.9	2.5	100.0%
10.0	21.4	.0	.0	22.8	.0	.0	.0	100.0%
2.3	8.0	1.1	29.5	2.3	2.3	12.5	.0	100.0%
4.7%	7.2%	1.7%	12.4%	6.7%	3.0%	4.7%	3.5%	100.0%

Table A9:

DISTRIBUTION OF G.F.A. IN INDUSTRIAL AREAS IN METRO TORONTO

Land Use	North-West Etobicoke	Rexdale	Southern Etobicoke	Highway 400 Corridor	Weston Road/ Junction	Toronto Central Area/Waterfront	Dufferin/Keele North
Industry							
. General Manufacturing	1.3%	10.2%	17.0%	12.0%	12.0%	13.8%	5.1%
. Warehouse	7.3	16.2	13.8	15.0	5.9	7.3	3.4
. Transportation/Communication	.6	1.3	27.8	.5	18.2	29.6	2.2
. Mixed Industrial/Commercial	7.9	3.5	5.6	11.8	.0	1.6	23.3
. Sewer/Water/Refuse/Maintenance	.1	19.8	4.7	1.2	3.4	38.6	11.5
. Open Storage	.0	1.0	1.6	67.9	4.8	11.9	1.4
. Storage Tanks	.0	.0	.7	.0	8.8	41.9	47.4
. Heavy Industry	1.2	11.3	25.1	2.6	1.4	20.2	1.0
. Research and Development	.0	58.2	.0	3.8	1.2	.0	.0
Office	2.2	14.2	9.1	8.1	5.4	32.1	2.6
Retail	1.4	4.2	10.7	12.6	10.3	27.2	7.2
Accommodation	.0	13.2	.7	4.0	.0	37.8	.0
institutional	.2	3.5	9.0	23.5	9.3	24.5	4.5
Recreation	.0	1.8	8.3	14.4	6.9	15.7	25.6
Other	.2	5.0	8.5	5.6	10.8	37.3	2.1
Total	**2.7%**	**9.7%**	**13.3%**	**11.4%**	**8.7%**	**18.0%**	**6.7%**

Source: M.T.P.D.; E.L.A. 1985 Special Run 3.64

Dufferin/Keele South	Don Valley/ 404 Corridor	Milliken	Tapscott/ Marshalling Yard	Scarborough/ 401 Corridor	West-Central Scarborough	South-West Scarborough	South-East Scarborough	Total
5.9%	5.6%	.6%	2.0%	3.5%	5.0%	5.6%	.4%	100.0%
10.6	6.4	.2	5.2	4.3	1.7	2.7	.0	100.0%
3.5	9.5	.1	1.0	2.0	.4	2.5	.8	100.0%
3.7	7.0	2.1	11.4	11.6	5.9	3.7	.7	100.0%
4.0	2.8	.0	5.5	1.1	1.4	1.0	5.0	100.0%
6.2	.2	.9	2.5	1.0	.0	.7	.0	100.0%
.0	.2	.0	.1	.3	.0	.7	.0	100.0%
1.3	14.1	.0	.0	.4	.0	21.4	.0	100.0%
5.1	25.7	.0	.0	4.5	1.5	.0	.0	100.0%
2.1	14.3	.4	2.6	3.2	.6	2.4	.5	100.0%
8.3	4.3	.4	2.2	1.7	2.6	6.7	.0	100.0%
11.8	23.5	.0	.0	9.0	.0	.0	.0	100.0%
9.7	6.1	.1	.1	1.9	.1	7.6	.0	100.0%
8.7	5.3	.0	3.3	2.9	4.5	2.5	.0	100.0%
2.3	13.6	1.6	6.8	2.8	0.2	2.5	0.5	100.0%
5.9%	7.5%	.6%	3.8%	4.0%	3.2%	4.7%	.4%	100.0%

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INFORMATION TO THE READER

This report is one of a series of background and proposal studies undertaken in the general area of "employment areas and activities" as part of the Metropolitan Plan Review; the other reports are on the Metropolitan economy, "Centres", and office development.

All members of the community are invited to comment on the matters presented. It is hoped that individuals and organizations with particular expertise on items raised here, will convey their conclusions, concerns and recommendations. These comments will be considered and reported in the preparation of policy recommendations which will follow.

Submissions should be sent to:

Metropolitan Toronto Planning Department
Policy Development Division
East Tower, 11th Floor
City Hall
Toronto, Ontario
M5H 2N1

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The "Metropolitan Plan Review" is a program to review the Official Plan For The Urban Structure: Metropolitan Toronto. The program was adopted by Metropolitan Council in March of 1986 and is available in printed form as "Report No. 1: Program, Metropolitan Plan Review". Copies are available from the above address.

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Please mail one copy of Industrial Areas to:

Name _____

Street _____(Apt.#)_____

Municipality _____

Postal Code _____

A cheque or money order for $3.00 is enclosed.